CRITERION

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CALIFORNIA MARKET POTENTIAL STUDY

Prepared for:

Alberta Tourism

April, 1990

Alberta
TOURISM

CityCentre, 10155 - 102 Street, Edmonton, Alberta, Canada T5J 4L6

To Whom it may Concern:

The following consultant's study was undertaken by an independent consultant commissioned by Alberta Tourism. The purpose of the study was to provide information about the potential tourism market in California. This study was completed in March 1990.

One page has been removed from this report. This page (73) contained confidential information for the use of Alberta Tourism.

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EXECUTIVE SUMMARY

In March, 1990, Criterion Research undertook a market potential study in California for Alberta Tourism. The overall objectives of the study were to determine how many California residents were aware of Alberta, had been to Alberta, where they had travelled in the past twelve months, what features are important in determining ultimate destinations, and what vacation experiences are part of their primary vacation.

The data for the study was collected utilizing computer assisted telephone interviewing (C.A.T.I.) between March 11th and April 4th in Portland, Oregon. The study was stratified by geographic region within California; southern California, northern California, San Diego, Los Angeles, and San Francisco. It was further stratified by market segment and income. Respondents were screened for whether their household income was over or under $25,000 (U.S. funds). One hundred surveys were completed with respondents from households with an income under $25,000 after which only respondents from households with incomes in excess of $25,000 were interviewed unless they were students or retired.

A systematic random sampling was performed and 4,100 telephone interviews were conducted.

A. KEY FINDINGS

1. Market Segments

- By market segment, 24 percent of the sample were married/single, 18 to 44 years old without children at home; 36 percent were married/single with children under 18 years of age at home; and 40 percent were married/single, 45 years of age or older without children at home.

2. Vacation Behavior

- In total, 75 percent of the sample had taken a vacation of at least two nights away from home in the last year.

- Eighty-five percent reported that they would take a vacation of least two nights away from home in the next year.

- Almost two-thirds of respondents took a vacation of two nights or more within California, while 44 percent reported having taken a flying vacation of at least 1,000 miles outside California. One-third of respondents took a driving vacation of five nights or more of which at least three nights were outside California. Approximately one in four respondents took a combined business and pleasure trip.

- California residents were most likely to take their vacations in July or June followed by August and December.

- The average length of a primary vacation trip was 11.6 nights away from home.

- Respondents whose vacation was outside California were likely to take more protracted holidays and reported that they had spent just under twelve days outside California.

- Just under one-half of 1 percent of respondents had come to Alberta on their primary trip last year while 2 percent reported they had gone to British Columbia. Another 68 percent visited somewhere else in the United States for their primary vacation. A further 6 percent reported going to Mexico, 1 percent said they went to Central or South America, 3 percent visited the Caribbean, and 11 percent said they went overseas.

- The activities or experiences most people desired when taking a primary vacation were visiting friends or relatives, relaxation, or sightseeing and touring. Older respondents were more interested in visiting friends or relatives and sightseeing while younger respondents tended to be seeking relaxation.

- The primary purpose of the main trip taken by California residents was vacation (55%), visiting friends or relatives (32%), business (5%), and convention (3%).

- The criteria people use to determine which of their vacations was the primary one, if they had taken more than one, included the length of time, importance of the destination, whether or not they had visited family or friends, and the distance away from home.

3. Vacation Planning

- Having a place to relax, natural beauty, value for dollar spent, something new and different, and lots to see and do were the five vacation characteristics rated as the most important in selecting a destination.

- Downhill skiing, golf, fully serviced campgrounds, adventure products, and shopping were rated of least importance in selecting a destination.

4. Informational Needs

- Four informational requirements were mentioned with far greater frequency than any others. They were: places to see and visit, hotel/motel accommodation information, transportation, and maps and routes.

- The informational sources usually used when planning a trip were travel agents (43%), family and friends (36%), automobile clubs (29%), newspapers or magazines (15%), and tourism departments (13%).

- Fifty-three percent of respondents reported having an automobile club membership with 23 percent being members of the Automobile Club of Southern California, 18 percent being members of the California State Automobile Association, 4 percent simply saying they belong to AAA, and 8 percent mentioning some other travel club.

- Forty-nine percent of students, retired people, and respondents from households over $25,000 reported they had attended a sports or outdoor activity show in the past three years. An outdoor activity show would encompass such shows as a fishing, hunting, or boating show among others. Forty-four percent had attended the California State Fair, 26 percent the L.A. State Fair, and 25 percent a consumer show. Sixteen percent said they had attended a ski show in the past three years.

- Sports or outdoor shows were attended with more frequency than other shows as those respondents who had reported going to a sports or outdoor show in the past three years had, in fact, attended 3.56 times on average. Those who went to consumer shows attended approximately 1.65 times in the past three years and those who attended ski shows attended 1.49 times.

- All of the shows and fairs examined were rated more highly as travel information sources than they were as an aid to making travel decisions.

- Consumer shows and ski shows were rated most highly of all shows and fairs as information sources and as aids to making travel decisions.

5. Media Behavior

- Reader's Digest, National Geographic, Modern Maturity, Sunset Magazine, and Time Magazine were the most frequently bought or subscribed to publications by students, retired people, and those respondents from households over $25,000. Regional magazines like the San Francisco Focus, the Los Angeles Magazine, and the San Diego Magazine have good readership within their prescribed areas (25% in San Francisco, 17% in Los Angeles, and 23% in San Diego, respectively).

- The percentage of respondents subscribing to or buying American West, Pacific Northwest, Leisure World, Outside, Backpacker, and Endless Vacation was lower than 2 percent.

- Respondents were asked to rate how thoroughly they read specific publications on a scale of one to five where one represented "not at all thoroughly" and five represented "very thoroughly." With the exception of Modern Maturity, the magazines read by the most California residents were also read most thoroughly.

- The L.A. Times was reported to be subscribed to by 30 percent of students, retired people, and those respondents in households over $25,000 while the San Francisco Chronicle is subscribed to by 12 percent, the Sacramento Bee by 7 percent, and the Wall Street Journal and San Diego Union by 6 percent, each.

- California residents generally watched some television between 7 p.m. and 10 p.m. almost 5 nights a week while they watched between 5 p.m. and 7 p.m. four nights a week. Morning television viewing was the lowest of all time periods.

- Respondents reported watching news very frequently (5 days a week). Sitcoms were the next most popular type of shows followed by documentaries, sports, and network movies.

- Daytime and evening soaps, on average, were viewed least frequently.

6. Alberta Vacations

- Awareness of Calgary as a vacation destination (79%) was higher than awareness for Alberta (73%). This implies that a certain percentage of respondents do not know that Calgary is, in fact, in the province of Alberta. Fifty-six percent had heard of Edmonton, 44 percent of Banff, 53 percent of Lake Louise, and 45 percent of Jasper.

- In total, 91 percent had heard of Alberta or some location within Alberta as a vacation destination.

- Two-thirds of respondents described Alberta's location as "in Canada" while only 8 percent each were more specific by saying it was "east of British Columbia" or "in western Canada."

- Twenty-seven percent of California residents who are aware of Alberta as a vacation destination have visited Alberta or an Alberta location in the past and 4 percent have visited Alberta or an Alberta location in the past twelve months.

- Thirty-two percent of those who are aware of Alberta as a vacation destination said they had visited British Columbia while 4 percent said they had visited it in the last twelve months.

- Twenty percent of Alberta aware respondents had visited Vale or Aspen, 10 percent Whitefish or Big Sky, and 3 percent Whistler at some time in the past.

- Sixty-three percent of California residents were aware of the Calgary Stampede with northern California residents being most aware (66%) and San Francisco residents least aware (60%).

- Friends and relatives and advertising contributed most frequently to the awareness of the Calgary Stampede (27% each).

- Six percent of respondents have visited the Calgary Stampede and 36 percent have considered visiting the event.

- Of the various experiences provided by a visit to the Calgary Stampede, the Rocky Mountain scenery, hospitality or western experience, and the rodeo or cowboys were most likely to impact upon the decision making process.

- More than 25 percent of respondents who had visited Alberta at some time in the past had visited more than fifteen years ago while 21 percent last visited Alberta between 1975 and 1980. Thirteen percent visited between 1981 and 1984 and either 5 or 6 percent said they visited Alberta in the years since 1985.

- Most respondents who ever came to Alberta categorized their trip as a touring or outdoor vacation, with older respondents much more likely to describe the vacation as a touring holiday and younger respondents as an outdoor holiday.

- One percent, each, said they have completed planning or are definitely planning a trip to Alberta in the next twelve months. A further 6 percent said they are considering it, 46 percent said they are not presently but would consider it, and 43 percent said they would not consider a trip to Alberta in the next twelve months.

- As with past vacations, outdoor and touring trips were reported to be the most likely trip types to occur.

- On average, respondents who are planning a trip to Alberta estimated they will stay 16 days away from home in total.

- Of the 16 days, approximately 6 will be spent in Alberta and 5 will be spent in a Rocky Mountain location.

- Most respondents planned to travel individually or in pairs (20% and 51%, respectively). The average party size will reportedly be 2.19 individuals.

- Forty percent plan to travel to Alberta in their own car, 17 percent by airplane and rental vehicle, 16 percent in a camper or recreational vehicle, and another 15 percent by airplane.

- Types of accommodations were well distributed with anywhere from 12 to 17 percent reporting that they will stay in luxury hotels, budget hotels, camping or campers, R.V.'s, or motels.

- Fifty-four percent of respondents said they plan to visit Alberta in the summer with 20 percent saying they will visit in the spring, 14 percent in the fall, and only 3 percent in the winter.

- Respondents who are planning a trip to Alberta in the next 12 months reported they would collect information needed from travel agents, tourism departments, automobile clubs, and friends or family.

- Twenty-six percent of respondents who are aware of Alberta said they or someone in their household would consider golfing at various resorts as part of their vacation. Younger respondents were considerably more likely to say this than respondents over 55 years of age. Sixteen percent said they or someone in their household would consider a golf tour vacation at various resorts in the Canadian Rockies.

1. INTRODUCTION

California represents a potentially fruitful tourism market having a total population almost equivalent to the total population of Canada. Alberta Tourism has determined, as part of their strategic marketing plans, to continue to measure and assess travel trends and behavior patterns among California residents. In order to maximize market share, Alberta Tourism determined to measure the size and potential of the California market as well as to assess patterns of travel, in general, and patterns of travel to Alberta, specifically. Overall, how best to reach various segments of the California market which are interested in Alberta and the products it offers was another purpose of this study.

1.1 RESEARCH OBJECTIVES

With these questions in mind, the Terms of Reference for this study were deve[illegible] Before turning to the detailed results of the project, we will briefly review the research objectives. The principle objective of the study was to determine "the size, potential, and how best to reach various segments of the California market which would potentially desire an Alberta vacation experience."[1]

In addition to the principle objective, the study has the following secondary objectives with respect to the various segments:

1. To determine the frequency of taking a vacation and the percentage of California residents taking specific vacation types; namely,
    a. Those who fly, spend two nights or more out-of-state, and travel at least 1,000 miles,
    b. Those who drive, spend five or more nights on their trip of which three nights are out-of-state, and
    c. In-state or short vacation travel.

[1] Terms of Reference for a California Market Potential Study, Alberta Tourism, 1989

2. To determine the type of vacation, as defined above, usually taken (short versus long duration). This will include the primary purpose of the trip as well as the type of vacation experience sought (i.e. touring vacation, adventure vacation, golf vacation, etc.).

3. How the vacation destination is chosen (eg. for the experience, amenities, weather, facilities, etc.)? What factors are important in choosing a vacation destination?

4. When planning begins for a vacation? When do visitors collect information on destinations? What type of information is collected?

5. How do travellers narrow the choice of vacation destinations? When is a decision made? Which factors used to consider a destination are used in making their final destination decision?

6. In what season do travellers like to take their vacations and why? Which is the primary vacation?

7. How is travel information usually gathered? What kinds of information are required to fulfill planning needs (specifically: government travel literature, travel agents, auto clubs, tour operators, toll-free information lines, coupons, hotels/resorts, airlines, and brochures)?

8. Do travellers visit travel shows? Are these shows useful in making future travel decisions, to increase awareness, or to gather information?

9. What types of print media do they read? Which particular magazines or newspapers are read and how frequently are they read? How often do they watch television and which programs do they view regularly?

10. What type of vacation experience would they like to have? If likely to vacation in Alberta, when would this type of vacation be taken, what would be the length of the trip and the mode of transportation, travel party size, and need for additional travel information?

11. Previous travel experience in Alberta,

12. Awareness of Alberta and its location, and

13. Slogan recall.

In the report which follows, the ways in which these questions were addressed in this survey and the answers received will be discussed in some detail. In addition, a complete set of weighted and unweighted detailed tables are included under a separate cover for the convenience of readers who wish to examine the results more closely.

2. METHODOLOGY

The survey methodology employed in this study was developed in consultation with representatives from Alberta Tourism. The sample frame for the study consisted of residents of California. A systematic random sampling was used and some 4,100 interviews were conducted. The specific details associated with the design of the survey and the analysis of the results are described below.

2.1 QUESTIONNAIRE DESIGN

A questionnaire was designed by Criterion Research to address the objectives of the study. The draft was submitted to Alberta Tourism client representatives and feedback was obtained. Additions, deletions, and adjustments to the survey instrument were made and a pretest was conducted among a small sample of potential respondents. After pretesting, a few minor revisions were made to improve the instrument as a whole. A copy of the final instrument used is included in the Appendix.

2.2 SAMPLING

The target populations for this study were drawn from the total population of Califo[illegible] but were stratified by geographic region with enforced quotas. The distribution of the sample follows:

Regions	Quotas
Los Angeles	900
San Diego	700
San Francisco	700
Other southern California (south of Bakersfield)	900
Other northern California (north of Bakersfield)	900

In each area a quota of at least 100 respondents from households with incomes under $25,000 was established. Once this quota was reached, only households with incomes in excess of $25,000 were interviewed unless they were retired people or students.

Respondents had to be at least 18 years old, speak English, and be the adult in the household whose birthday came next.

2.3 DATA COLLECTION

In all, 4,104 telephone interviews were conducted between Friday, March 9th and April 6th, 1990. Interviews were completed using a computer assisted telephone interviewing (C.A.T.I.) system from Columbia Information Systems in Portland, Oregon. Telephone numbers were generated using a random digit dialing. This methodology relies on a master prefix data base which lists the number of residential telephones assigned to each three digit prefix within the area of interest. Using a computer program, random numbers are generated for each prefix in proportion to the number of residential telephones assigned to the prefix. This strategy ensures a balanced selection of respondents and is not biased by the under-representation of unlisted numbers.

Interviews were conducted during the late afternoons, evenings, and on weekends, and a minimum of three callbacks were made to "not at homes."

When contacting a household, an interviewer would identify himself or herself as an employee of Criterion Research and inform the person contacted that this survey dealt with attitudes towards travel. The interviewer then asked to speak to the person in the household who was over 18 years of age and whose birthday came next.

EXHIBIT 1

SAMPLE DISPOSITION

	Total	Los Angeles	San Diego	San Francisco	South California	North California
Completes	4104	900	703	700	901	900
Refusals***	9735	3121	1700	1800	1716	1398
Terminations**	891	193	118	124	181	275
Not-in-service	9341	1580	1199	1779	2992	1791
No Answer*****	75751	18704	12460	13424	16392	14771
Respondent Not Available*	192	82	51	21	16	22
Not Qualified						
- Quotas Filled	384	84	33	103	62	102
- Language	2326	568	782	208	477	291
- Business Number	1193	282	302	202	230	177
Refusals Rate****	39%	27%	39%	36%	47%	54%

* Qualified respondent not available for duration of survey.
** Terminated interview at some point after starting survey.
*** Refused prior to screening questions.
**** Refusal rate is the number of completes to the number of refusals and terminations.
***** No answers are based upon the number of calls, not upon the number of respondents who resulted in a no contact and, consequently, were dropped from the sample. Households received a minimum of three callbacks before they were dropped from the sample.

Exhibit 1 provides a breakdown of the sample disposition and a calculated refusal rate. A total of 9,735 refusals resulted in a refusal rate of 39 percent based upon the percentage of completes to refusals and terminations.

2.4 ANALYSIS

After the interviews were conducted on the C.A.T.I. system, a printout of the open-ended responses for the first 600 surveys was sent to Criterion in Winnipeg and a coding manual was developed. The coding categories were received and approved by Alberta Tourism client representatives. These coding responses were used to code all of the interviews.

The analysis for this report consisted primarily of detailed cross-tabulations of responses to each question by location, market segment, age categories, gender, income groups, likelihood of travel, conversion steps, trip type, and destinations.

Trip types were defined as follows and data was collect for each type of trip.

a. An outdoor vacation - A vacation in a natural area where you may engage in activities such as camping, fishing, hiking or rafting

b. A resort vacation - A trip to a resort area where a wide variety of seasonal activities, such as swimming, skiing, golfing, tennis, and so on, are available close by or on the premises.

c. A touring vacation - A vacation by car or bus or train through areas of scenic beauty, cultural or general interest

d. A town or city trip - A trip to a town or city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city.

e. A visit to friends or relatives - A trip whose primary purpose is to visit and spend time with friends or relatives.

f. A business or convention trip - For instance, attending a meeting, seminar, conference, or convention

g. A combined business and pleasure trip - A trip that combines business and pleasure.

h. A golfing holiday

However, cross-tabulations in the detailed tables included only touring, outdoor, and other trip types. "Other" trip types includes visit to friends/relatives, combined business and pleasure, resort, business/convention, city or town, and golfing trips because the low frequency count for each of these trip types did not warrant individual banners.

The cross-tabulations for destinations include the respondents who said they had at some time visited Alberta, Calgary, Edmonton, Banff/Lake Louise/Jasper, the Canadian Rockies, British Columbia, other ski areas, (Whistler, Vale, Aspen, Whitefish, or Big Sky), and the net number of respondents who had visited Alberta (includes anyone who said they had visited Alberta, an Alberta destination, or the Canadian Rockies).

The data from the study were weighted. The data was weighted back to the population figures for California based upon the July 1, 1989 Census of Population Estimates from the 1980 U.S. Census. The details of the weighting breakdowns are provided below.

1980 CENSUS OF POPULATION - 18 YEARS OR OLDER

MARKET SEGMENTS

	18-44 years old no children	Family Households	45 or more years old, no children
San Diego	26.2%	34.8%	39%
Los Angeles County	25.1%	34.6%	40.3%
San Francisco M.S.A. (San Francisco, Marin, San Mateo Counties)	31.6%	25.6%	42.8%
Southern California	21.6%	38.6%	39.8%
Northern California	23.3%	37.2%	39.5%

JULY 1, 1989 - CENSUS OF POPULATION ESTIMATES

TOTAL POPULATION

San Diego	2,459,500
Los Angeles	8,710,400
San Francisco M.S.A. (San Francisco, Marin, San Mateo Counties)	1,598,700
Southern California	6,628,800
Northern California	9,665,800
Total	29,063,200

Before turning to these results, however, a brief digression concerning statistical significance is in order. In the text, no references are made to statistical significan because such references can, at times, be very misleading. For a given sample size, it is possible to set what are called confidence bounds or limits around an observed percentage and assert that such limits are correct 95 (or 90 or whatever) percent of the time. These are valuable indicators of the reliability of the observed results and should always be considered when looking at the survey results because such intervals vary dramatically by sample size or cell size in a table (a table of these intervals, therefore, is provided in the Appendix for reference purposes). Having said that, we must also point out the one very real problem with such tables is that they do not give any indication of whether an observed percentage is meaningful. That depends upon the context and the interpretation which will made, not just the confidence level. For this reason, we have chosen to eliminate references to statistical significance and to focus, instead, on results which seem interesting and meaningful. For those who are interested, however, a complete set of results is included in the detailed tables.

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3. RESULTS

In the following pages, the main findings from the study are presented in summary form. For the convenience of the reader, the findings are grouped under eight headings:

3.1 Market Segments,

3.2 Vacation Behavior in Past Twelve Months,

3.3 Vacation Planning,

3.4 Informational Needs,

3.5 Media Behavior,

3.6 Alberta Vacations,

3.7 Alberta Advertising and Slogans, and

3.8 Background Information.

In each section, the results will be discussed in total and by region and, where appropriate, by gender, age, and market segment.

3.1 MARKET SEGMENTS

EXHIBIT 2

HOUSEHOLD CONFIGURATION

(Base: Total Sample)

Household Description	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	%
Married/Single; 18-44 Years Old; No Children at Home	24	25	26	32	22	23
Married/Single; Children Under 18 Years of Age at Home	36	35	35	26	39	37
Married/Single; 45 Years of Age or Older; No Children at Home	40	40	39	43	40	40

* Based on weighted data to 000's.

Q.3 Which of the following three categories best describes your household situation? Are you .....?

a. Married or single, between 18 and 44 years old, with no children under 18 years of age at home, or

b. Married or single with children under 18 years of age at home, or

c. Married or single, 45 years of age or older with no children under 18 years of age at home.

Overall, 24 percent of California residents are 18 to 44 years old without children (childless young), 36 percent are married or single with children at home (families), and 40 percent are empty nesters; that is, married or single and over 44 years of age with no children under 18 years old at home. San Francisco has the largest percentage of childless young and the lowest percentage of families.

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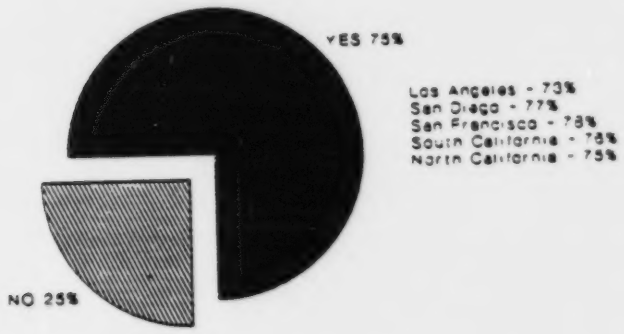
3.2 VACATION BEHAVIOR

EXHIBIT 3

PERCENTAGE OF RESPONDENTS HAVING TAKEN AT LEAST A TWO-NIGHT VACATION IN THE PAST YEAR
(BASE: TOTAL SAMPLE)
N=29064*



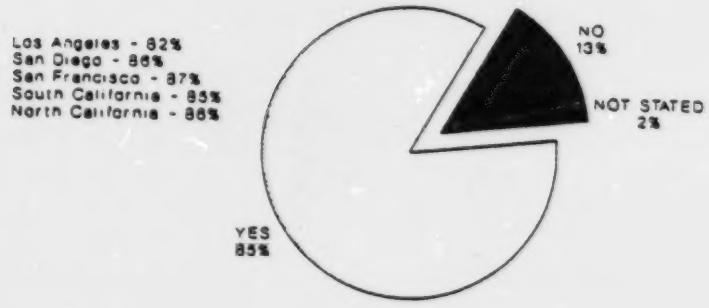
* Based on weighted data to 000's.

Q. 1 Have you taken a vacation of at least two nights away from home in the past year?

In total, 75 percent of the sample had taken a vacation of at least two nights away from home in the past year. There was little difference in the percentage of respondents who took a vacation in each of the five California regions though the percentage of travellers was lowest in Los Angeles. Retired residents and students were less likely than other market segments to have taken a vacation of least two nights away from home in the past year (70% each compared to 77%, 18-44, no children; 74%, families; and 74% empty nesters). Thirty-five to 54 year olds and men travelled more than their counterparts.

EXHIBIT 4

PERCENTAGE OF RESPONDENTS PLANNING TO TAKE AT LEAST A TWO-NIGHT VACATION IN THE NEXT YEAR
(BASE: TOTAL SAMPLE)
N=29064•



• Based on weighted data to 000's.

Q.2 Do you plan to take a vacation of at least two nights away from home in the next year?

Ten percent more (85%) plan to take a vacation of at least two nights away from home in the next year than the percentage of respondents who actually have vacationed in the last year. Eighteen to 44 year olds with no children and students (89% and 87%, respectively) were most optimistic about their future travel plans as were men (88%) and those 35 to 54 years of age (88%).

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EXHIBIT 5

NUMBER OF SPECIFIC TYPES OF VACATIONS TAKEN IN THE PAST TWELVE MONTHS

(Base: Total Sample)

Vacation Description	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
Q.6 At least 2 Nights Outside California; 1,000 Miles from Home; Flew	44%	48%	49%	53%	41%	41%
Mean Number of Trips						
Includes 0 Trips	0.8	0.9	1.0	1.1	0.7	0.7
Excludes 0 Trips	1.9	2.0	2.1	2.1	1.8	1.7
Q.7 At least 5 Nights Away from Home; At Least 3 Nights Outside California; Drove	33%	35%	34%	26%	35%	31%
Mean Number of Trips						
Includes 0 Trips	0.6	0.6	0.7	0.4	0.7	0.5
Excludes 0 Trips	1.8	1.7	1.9	1.7	1.9	1.7
Q.8 At least 2 Nights Away from Home; Within California Only; Drove or Flew	62%	58%	59%	63%	64%	64%
Mean Number of Trips						
Includes 0 Trips	2.3	2.0	2.0	2.5	2.5	2.3
Excludes 0 Trips	3.6	3.4	3.3	4.0	4.0	3.6
Q.9 At Least 1,000 Miles from Home; Combined Business and Pleasure	24%	24%	26%	27%	24%	24%
Mean Number of Trips						
Includes 0 Trips	0.6	0.6	0.6	0.8	0.7	0.5
Excludes 0 Trips	2.5	2.6	2.2	3.0	2.8	2.3

* Based on weighted data to 000's.

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EXHIBIT 6

THE MONTHS IN WHICH THE PRIMARY VACATION WAS THOUGHT ABOUT, DECIDED UPON, AND TAKEN
n=23243*

	Began Vacation	Decided Upon Vacation	Began to Think About Vacation
Prior to July '88	0	6	10
July/August '88	0	2	2
September/October '88	0	3	3
November/December '88	0	4	6
January '89	1	8	12
February '89	1	7	7
March '89	3	7	6
April '89	6	8	7
May '89	7	9	6
June '89	14	9	7
July '89	14	7	5
August '89	13	7	5
September '89	8	5	4
October '89	6	4	3
November '89	5	3	3
December '89	10	4	3
January '90	3	2	2
February '90	3	1	1
March '90	2	1	1

* Based on weighted data to 000's.

Q.10a I would like to ask you a few questions about the primary or main vacation trip you took in the past 12 months. In which month did you begin your primary vacation?

Q.10b In what month did you finally decide upon your destination?

Q.10c In what month did you begin to think about where you would go?

The largest percentage of people in California took their vacation in July or June (14% each), followed by August (13%) and December (10%). Students were most likely to take December vacations and families were more likely than others to take August vacations.

The months during which the most people made decisions regarding their final vacation destination were January, April, May, and June of 1989 (between 8% and 9% each).

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EXHIBIT 7

AVERAGE TOTAL LENGTH OF PRIMARY TRIP

(Base: Respondents who have taken a vacation in the past 12 months)

Number of Days	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	23243	6882	2025	1250	5322	7764
	%	%	%	%	%	%
1 - 6	37	35	34	26	40	38
7	14	16	11	13	14	12
8 - 14	28	28	35	31	25	28
15 - 21	10	10	8	13	9	10
22 - 30	5	4	6	7	4	5
More Than 30	5	4	5	6	5	6
Mean	11.6	11.1	11.8	13.4	11.3	11.9

* Based on weighted data to 000's.

Q.11a On this trip, how many nights, in total, did you spend away from home?

The largest percentage of respondents reported that their last primary vacation comprised less than seven nights away from home (37%). Fourteen percent said they were away 7 nights, 28 percent were away 8 to 14 nights, 10 percent vacationed 15 to 21 nights, and 10 percent spent more than 3 weeks on their primary vacation in the past twelve months.

San Francisco respondents, in general, took longer primary vacations than others, being away, on average, 13.4 nights compared to the overall average of 11.6 nights. As well, not surprisingly, empty nesters and retired people took vacations in excess of 21 nights more frequently than their counterparts.

EXHIBIT 8

AVERAGE NUMBER OF NIGHTS SPENT OUTSIDE CALIFORNIA

(Base: Respondents who have taken a vacation outside California in the past 12 months)

- Mean Values -

Number of Days	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	18188 %	5629 %	1708 %	1022 %	4044 %	5785 %
None	8	8	7	5	8	10
1 - 5	19	20	19	12	21	17
6 - 7	18	20	17	15	21	15
8 - 10	16	15	17	16	13	17
11 - 14	15	15	17	19	13	16
15 - 21	11	12	9	15	10	11
22 - 30	6	5	7	8	5	6
More Than 30	5	4	6	6	6	6
Mean	12.0	11.1	12.1	13.9	11.9	12.5

* Based on weighted data in 000's.

Q.11b How many of these nights were spent outside California?

Respondents who had travelled outside California on their primary vacation trip were asked how many nights they, in fact, spent outside the state. Including respondents who spent no nights outside California, on average, 12.0 nights were spent outside California with 1 to 5 nights (19%) and 6 or 7 nights (18%) being the most common answers. Those from San Francisco, on average, spent the most nights out-of-state (14.0 nights). Empty nesters, in general, took more prolonged vacations out-of-state than others.

EXHIBIT 9

MAIN DESTINATION OF PRIMARY VACATION IN PAST YEAR

(Base: Respondents who have taken a vacation outside California in the past 12 months)

Destination	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	18188	5629	1708	1022	4044	5785
	%	%	%	%	%	%
Alberta	0	0	0	0	0	1
British Columbia	2	1	2	2	1	3
Other Canada	2	2	1	2	4	1
Net Canada	**4**	**3**	**3**	**4**	**5**	**4**
Washington	5	5	3	3	4	5
Oregon	3	2	3	2	3	3
Nevada	6	6	8	4	6	6
Utah	2	3	1	0	3	1
Arizona	3	3	4	3	3	4
New Mexico	1	1	1	1	2	0
Texas	2	2	3	1	3	3
Montana	1	1	1	1	0	0
Alaska	1	1	1	1	1	0
Other Central U.S.	11	12	10	6	11	10
Eastern U.S.	14	14	15	14	12	14
Other U.S.	20	19	20	18	21	20
Net U.S.	**68**	**70**	**71**	**54**	**69**	**66**
Mexico	6	5	5	6	5	7
Central/South America	1	1	0	3	1	1
Caribbean	3	4	3	3	2	3
Overseas	11	11	8	21	7	11
Other	7	5	9	8	8	7
Net Other (non-Can/U.S.)	**27**	**25**	**26**	**40**	**23**	**29**

* Based on weighted data in 000's.

EXHIBIT 10

ACTIVITY OR EXPERIENCE DESIRED ON TRIP

(Base: Respondents who had taken a vacation at least 2 nights away from home in the past 12 months)

- Total Mentions -

Activity	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	23243	6882	2025	1250	5322	7764
	%	%	%	%	%	%
Visiting Family/Friends	40	36	48	35	40	42
Relaxation	34	39	30	37	31	31
Sightseeing/Touring	28	28	26	30	28	29
Business/Meeting/ Convention	7	8	5	6	7	7
Sun/Sunbathing/ Swimming	5	4	5	8	3	8
Fishing	5	3	5	3	6	5
Water Sports	4	4	6	5	4	4
Camping	4	3	5	2	5	5
Scenery	4	4	2	4	5	4
Gambling	4	4	4	2	5	3
Skiing/Winter Sports	3	3	4	3	3	3
Golf	2	1	1	1	3	1

* Based on weighted data in 000's.

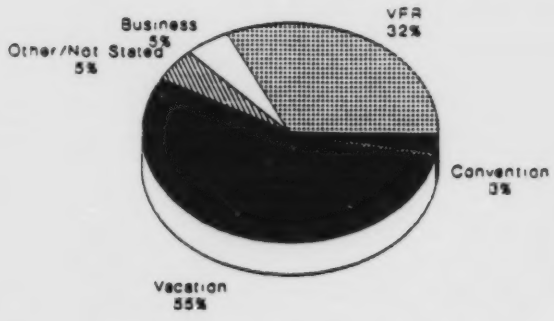
Q.11d What two activities or experiences were you specifically seeking on this particular trip?

Visiting family and friends, followed by relaxation and sightseeing/touring were the three activities that were mentioned most frequently (40%, 34%, and 28%, respectively). Seven percent said they were primarily going to meetings, conventions, or were on business, while 5 percent, each, were interested in sun or sun related activities like swimming and fishing. Four percent, each, were interested in water sports, camping, gambling, and scenery. Three percent said they wanted to ski or participate in some other winter sports while 2 percent specifically mentioned golf.

CRITERION

EXHIBIT 11

PRIMARY PURPOSE OF MAIN TRIP
n=23243*



* Based on weighted data to 000's.

Q.11e Was the primary purpose of this trip business, vacation, a visit to friends or relatives, or a convention, meeting, or conference?

Fifty-five percent categorized their primary trip as a vacation. Thirty-two percent said it was a visit to friends or relatives, 5 percent said it was a business trip, and 3 percent said they were going to a convention or meeting. There were few significant differences between subgroups except women and retired people were far less likely than others to cite business as the primary purpose of their trip.

EXHIBIT 12

FEATURES THAT CAUSED RESPONDENT TO CATEGORIZE THIS TRIP AS THEIR PRIMARY VACATION

(Base: Respondents who have taken more than one trip of 2 nights or more in the past 12 months)

- Total Mentions -

Features	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	19541	5730	1693	1109	4528	6481
	%	%	%	%	%	
Length of Time	31	31	37	30	3	34
Importance of Destination	20	22	19	10	19	22
Visit Family/Friends	14	17	15	10	14	14
Distance Away	10	10	11	5	8	11
Got Away From Work	9	9	9	4	8	10
Participating in Special Activities	8	7	9	3	12	8
Only Vacation Taken	8	8	9	3	7	10
Amount of Money Spent	7	5	11	2	7	8
Whole Family Went	6	6	5	2	5	8
Enjoyment Level	6	5	7		7	6

* Based on weighted data to 000's.

Q.12 What features of this vacation make you consider it as your primary or main vacation?

The largest percentage of respondents categorized this trip as their main vacation because of the length of time they were away (31%). Presumably the longest trip was their main vacation. Twenty percent said the importance of the destination made it a primary vacation, and 14 percent said they categorized it as such because they were visiting family or friends. The only other response to receive in excess of 10 percent was that the distance they had travelled on their trip caused them to categorize it as their primary vacation. Family participation, cost, enjoyment level, and type of activities also influenced between 6 to 9 percent.

CRITERION

EXHIBIT 13

IMPORTANCE OF VARIOUS VACATION CHARACTERISTICS IN THE DECISION MAKING PROCESS

(Base: Students, retired people, or households over $25,000 who took a vacation of at least 2 nights away from home in the past 12 months)

- Mean Values -

Characteristic	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	21692	6450	1838	1170	4978	7257
Place to Relax	4.2	4.2	4.1	4.2	4.2	4.2
Natural Beauty	3.9	4.0	3.8	3.8	3.9	3.9
Value for Dollar Spent	3.8	3.8	3.8	3.7	3.8	3.8
Something New and Different	3.4	3.5	3.4	3.3	3.6	3.4
Lots to Do	3.4	3.5	3.4	3.4	3.5	3.4
Budget Accommodations	3.0	3.0	3.0	2.8	3.1	3.0
Cities & Their Attractions	3.0	3.1	2.9	3.0	3.0	2.8
Mountain Scenery	3.0	3.0	2.9	2.9	3.0	2.9
Sense of History	2.9	3.0	2.8	3.0	2.9	2.8
Luxury Accommodations	2.8	2.9	2.6	2.6	2.8	2.6
Water Experiences	2.7	2.7	2.7	2.9	2.7	2.7
Sense of Wilderness	2.7	2.7	2.6	2.7	2.7	2.6
Distance	2.6	2.6	2.4	2.3	2.6	2.6
Outdoor Activities	2.5	2.4	2.5	2.4	2.5	2.6
Shopping	2.3	2.4	2.4	2.3	2.3	2.3
Adventure Products	2.0	2.0	2.0	2.0	2.1	2.1
Fully Serviced Campgrounds	1.8	1.7	1.8	1.6	1.8	1.8
Golf	1.4	1.4	1.5	1.4	1.5	1.3
Downhill Skiing	1.3	1.3	1.4	1.4	1.3	1.3
Resort Areas	2.4	2.5	2.4	2.5	2.5	2.3

* Based on weighted data to 000's.

CRITERION

EXHIBIT 14

ACTIVITIES PARTICIPATED IN ON LAST PRIMARY TRIP

(Base: Students, retired people, and households over $25,000)

Activity	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	21692	6450	1838	1170	4978	7257
	%	%	%	%	%	%
Sightseeing	77	79	74	79	78	76
Shopping	74	75	77	72	76	71
Visit National/State/ Provincial Park	66	67	66	63	66	66
Visit Zoo/Museum/ Natural Display	60	61	57	62	60	58
Nightlife/Recreation	60	65	62	62	61	55
Visit Friends/ Relatives	58	57	61	56	56	59
Hiking	39	36	43	36	39	41
Attend Small Town Festivals/Fairs	38	38	37	36	39	37
Short Tours/ Excursions	34	35	33	39	37	32
Water Sports	34	33	34	37	35	33
Cultural Events	31	33	30	36	31	30
Other Adventurous Activities	22	21	26	27	19	23
Fishing/Hunting	19	18	19	13	20	20
Attend Sports Event	15	16	16	15	17	14
Golf	10	8	12	12	13	2
Trail Riding	10	9	9	9	10	10
Downhill Skiing	6	5	8	10	5	6
Fly-in Fishing	5	5	6	4	6	5
Whitewater Rafting	3	3	3	5	4	3

* Based on weighted data to 000's.

CRITERION

3.4 INFORMATIONAL NEEDS

EXHIBIT 15

INFORMATIONAL REQUIREMENTS

(Base: Students, retired respondents, and respondents in households over $25,000)

Requirements	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
	%	%	%	%	%	%
Places to Visit/See	46	43	46	40	50	46
Hotels/Motels	44	47	44	44	43	41
Transportation	29	34	35	34	25	26
Maps/Routes	27	26	26	27	24	29
Weather	11	11	9	12	10	13
Costs/Exchange Rates	10	11	11	7	7	12
City Information	9	10	9	12	9	7
Restaurants	8	9	9	12	7	7
Campgrounds	7	5	7	6	8	9
Guide Books/ Brochures	7	7	8	3	5	9
Other Information Sources	5	6	5	7	4	5
R.V. Facilities	2	2	2	1	1	2
Fishing	2	2	1	2	4	2
Skiing	1	1	1	1	1	0
Golf Courses	1	1	0	2	1	1

* Based on weighted data to 000's.

CRITERION

EXHIBIT 16

USUAL INFORMATIONAL SOURCE

(Base: Students, retired people, and households over $25,000)

Source	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
	%	%	%	%	%	%
Travel Agent	43	44	41	50	41	42
Family/Friends	36	35	35	30	37	37
Automobile Club	29	30	26	26	29	29
Newspaper/Magazine	15	17	14	12	14	14
Tourism Department	13	10	14	13	16	14
Hotel/Resort/Airline	12	13	14	12	11	11
Library	7	5	9	11	7	7
Travel Club	7	7	8	5	7	6
Pop-up Cards	4	4	4	4	4	5
Purchase Books	4	4	5	6	5	4
Maps/Atlas	3	2	3	2	3	4
Television Programs/ Travel Channel	3	3	2	1	3	3
Magazine Response Cards/Coupons	3	3	3	2	3	4
1-800 Number	2	2	2	1	2	2
Tour Operator/Bus Tour Operator	2	2	1	3	2	3

* Based on weighted data to 000's.

Q.15b Where do you usually get any travel information you need when you're planning a trip?

Travel agents, family and friends, automobile clubs, newspapers/magazines, and tourism departments are the most common sources of travel information (43%, 36%, 29%, 15%, and 13%, respectively). Travel agents are viewed as information sources more frequently in San Francisco than in other areas.

EXHIBIT 17

INFORMATION SOURCES USED FOR MOST RECENT PRIMARY VACATION

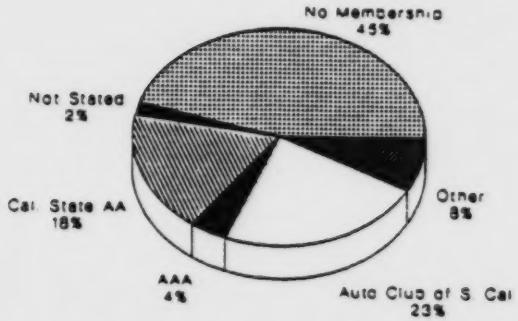
(Base: Those who usually use specific travel information sources)

Usual Source (n=*)	Total %	Los Angeles %	San Diego %	San Francisco %	South California %	North California %
Travel Agent (10693)	57	60	63	59	51	57
Family/Friends (8885)	67	69	72	69	68	63
Automobile Club (7201)	58	59	65	55	59	55
Tourism Department (3316)	53	52	53	60	52	52
Hotel/Resort/ Airline (2989)	63	63	70	67	64	59
Library (1738)	52	60	54	63	60	39
Travel Club (1704)	58	65	54	51	49	60
Magazine Pop-up Cards (1026)	39	50	49	56	39	25
Clip-out Coupons (797)	33	31	51	48	28	32
1-800 Number (451)	54	44	44	60	67	55
Tour Operator/ Organizer (377)	61	55	52	10	70	69
Motor Coach/Bus Tour Operator (140)	60	78	0	22	0	62

* Based on weighted data to 000's.

EXHIBIT 18

AUTOMOBILE CLUB MEMBERSHIP
n=24955•



• **Based on weighted data to 000's.**

Q.16a/16b Are you a member of an automobile club or association? Would that be the California State Auto Association, Auto Club of Southern California, or another club or association?

Forty-five percent of the respondents reported not having an automobile club membership, while 23 percent are members of the Automobile Club of Southern California and 18 percent are members of the California State Automobile Association. Membership in the Automobile Club of Southern California is especially high in Los Angeles (41%), in southern California (32%), and in San Diego (30%). Only 5 and 3 percent, respectively, belong in San Francisco or northern California. As age increases so do membership levels.

Membership in the California State Automobile Association is highest among San Francisco residents (49%) and northern California residents (37%). Also, females and those over 55 years of age are more likely to belong to an automobile club or association than their counterparts.

CRITERION

EXHIBIT 19

PERCENTAGE OF RESPONDENTS WHO HAVE EVER VISITED VARIOUS SHOWS

(Base: Students, retired people, and households over $25,000)
n=24955*

Activity	Ever Attended %
Sports or Outdoor Activity Shows	49
California State Fair	44
L.A. State Fair	26
Consumer Shows	25
Ski Shows	16
None/Not Stated	21

* Based on weighted data to 000's.

Q.17a Have you ever attended .....?

Forty-nine percent of students, retired people, and individuals from households over $25,000 reported having visited a sports or outdoor show at some time, while 44 percent have attended the California State Fair. Attendance at the other three events was considerably lower with 26 percent having visited the L.A. State Fair, 25 percent a consumer show, and 16 percent a ski show.

EXHIBIT 20

ATTENDANCE AT SPECIFIC FAIRS OR SHOWS IN THE PAST THREE YEARS

(Base: Respondents who have visited each activity in the past 3 years)

- Mean Values -

Activity (n=*)	Mean No. of Visits in 3 Years	Los Angeles	San Diego	San Francisco	South California	North California
Sports or Outdoor Activity Shows (12299)	3.6	4.0	5.5	2.8	3.2	3.1
Consumer Shows (6111)	1.7	1.7	1.9	2.1	1.7	1.-
Ski Shows (3868)	1.5	1.9	1.6	1.3	1.2	1.3
California State Fair (11070)	1.3	1.1	1.3	0.8	1.2	1.5
L.A. State Fair (6373)	1.2	1.4	0.7	0.2	1.3	0.3

* Based on weighted data to 000's.

Q.17b How often in the past three years have you attended .....?

Individuals who visit sports or outdoor activity shows are frequent attendees. In fact, on average, they have visited 3.6 shows in the last 3 years. Presumably, this means respondents have attended the same show (for example, a boat show) more than once in the past three years or have attended a variety of different outdoor shows. The mean number of visits to consumer shows is 1.7, to ski shows is 1.5, to the California State Fair is 1.3, and to the L.A. State Fair is 1.2 in the past three years.

CRITERION

EXHIBIT 21

USEFULNESS OF SPECIFIC FAIRS AND SHOWS IN HELPING TO MAKE TRAVEL PLANS AND AS INFORMATION SOURCES

(Base: Those who have ever visited a specific fair or show)

- Mean Values -

Activity (n=*)	Total		Los Angeles		San Diego		San Francisco		South California		North California	
	Travel Plans	Info. Source	Travel Plans	Info. Source	Travel Plans	Info. Source	Travel Plans	Info. Source	Travel Plans	Info. Source	Travel Plans	Info. Source
Consumer Shows (6111)	2.8	3.5	2.8	3.6	2.8	3.5	2.7	3.3	2.9	3.6	2.6	3.3
Ski Shows (3868)	2.6	3.0	2.8	3.3	2.7	3.2	2.3	2.6	2.4	3.0	2.5	2.7
Sports/Outdoor Shows (12299)	2.5	2.8	2.5	2.9	2.4	2.7	2.2	2.5	2.5	2.9	2.4	2.8
California State Fair (11070)	2.0	2.3	2.1	2.3	1.9	2.2	1.8	2.0	2.1	2.4	1.9	. .
L.A. State Fair (6373)	1.9	2.2	2.0	2.3	1.8	2.1	1.3	1.5	1.9	2.2	1.7	2.0

* Based on weighted data to 000's.

Q.17c/d On a scale of one to five, where one represents "not at all useful: and five represents "very useful" how useful do you consider ..... in helping make future travel decisions? How useful are they in providing an opportunity to gather travel information?

In general, all functions were rated more highly as travel information sources than as aids to making decisions about future travel.

As informational sources for travel, consumer shows received a mean rating of 3.5 by attendees, followed by ski shows (mean 3.0). Sports or outdoor shows received a rating of 2.8. California State Fair rated 2.3, and the L.A. State Fair rated 2.2 as a source of travel information.

Each of the activities maintained the same relative position as a travel decision aid.

CRITERION

EXHIBIT 22

PERCENTAGE OF RESPONDENTS SUBSCRIBING TO OR FREQUENTLY BUYING VARIOUS PUBLICATIONS

(Base: Students, retired people, and respondents from households over $25,000)

Publications	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
	%	%	%	%	%	
Reader's Digest	30	28	30	21	34	29
National Geographic	29	25	32	30	30	30
Modern Maturity	21	20	22	17	22	21
Sunset Magazine	19	14	21	27	18	22
Time Magazine	19	22	16	21	16	17
Motorland	14	2	2	39	2	31
People Magazine	14	15	13	12	13	14
Westways	11	20	12	1	14	1
Los Angeles Magazine	7	17	1	1	5	1
Travel and Leisure	6	6	6	10	5	5
California Magazine	5	5	5	5	5	6
San Francisco Focus	4	0	0	25	1	8
San Diego Magazine	3	1	23	0	2	1
Endless Vacation	2	2	2	1	2	2
Backpacker	2	1	1	1	2	1
Outside	2	2	2	3	2	2
Leisure World	2	2	2	3	1	2
Pacific Northwest	1	0	1	1	1	1
American West	1	1	1	0	1	1

* Based on weighted data to 000's.

CRITERION

EXHIBIT 23

THOROUGHNESS WITH WHICH FREQUENTLY PURCHASED MAGAZINES ARE READ

(Base: Students, retired people, and respondents from households over $25,000)

- Mean Values -

Magazines	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
Reader's Digest (7380)	3.9	3.8	3.9	3.7	3.9	3.9
Time Magazine (4616)	3.7	3.8	4.0	3.8	3.7	3.7
Sunset Magazine (4684)	3.7	3.6	3.8	3.7	3.8	3.8
Backpacker (365)	3.7	3.9	3.3	3.3	3.7	3.8
Nat'l Geographic (7187)	3.7	3.6	3.8	3.8	3.8	3.8
People Magazine (3423)	3.7	3.9	3.5	3.5	3.8	3.6
American West (192)	3.5	3.4	3.0	3.0	4.6	2.9
Pacific N.W. (192)	3.4	3.3	3.0	4.1	3.5	3.5
San Diego Magazine (691)	3.4	3.4	3.4	5.0	3.4	3.3
Outside (489)	3.4	3.3	3.4	3.4	3.5	3.4
Modern Maturity (5117)	3.4	3.3	3.3	3.1	3.6	3.3
Travel & Leisure (1402)	3.3	3.3	3.2	3.4	3.4	3.3
Leisure World (453)	3.2	3.3	3.7	3.1	2.6	3.4
Westways (2610)	3.2	3.2	3.2	3.0	3.2	3.3
California Mag. (1355)	3.2	2.9	3.2	3.2	3.2	3.3
L.A. Magazine (1682)	3.2	3.1	3.2	2.9	3.3	3.6
Endless Vacation (443)	3.1	3.8	3.2	3.5	3.2	2.6
Motorland (3487)	3.1	3.0	3.4	2.8	3.3	3.1
San Francisco Focus (1062)	3.0	4.2	--	3.2	2.6	2.9

* Based on weighted data to 000's.

Q.18b On a scale of one to five where one represents "not at all thoroughly" and five represents "very thoroughly," in general, how thoroughly do you read .....?

With the exception of Modern Maturity, the magazines read by the largest percentages of California residents are also read most thoroughly. Reader's Digest received a mean rating of 3.9 and the highest thoroughness rating in San Diego (3.9). Empty nesters (4.0), retired respondents (4.1), and 55 year olds or older (4.0) read Reader's Digest more thoroughly than others.

EXHIBIT 24

PERCENTAGE OF RESPONDENTS SUBSCRIBING TO OR FREQUENTLY BUYING VARIOUS NEWSPAPERS

(Base: Students, retired people, and respondents from households over $25,000)

Newspapers	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
	%	%	%	%	%	%
L.A. Times	30	67	15	1	38	2
San Francisco Chronicle	12	0	1	57	2	24
Sacramento Bee	7	0	0	4	1	19
San Diego Union	6	1	59	0	3	1
Wall Street Journal	6	7	4	10	4	5
Fresno Bee	3	0	0	0	0	8
San Jose Mercury News	4	0	0	4	0	12
Long Beach Press Telegram	4	14	0	0	1	0
Press Democrat	3	0	0	0	0	9
Press Enterprise	3	1	0	0	12	0
Orange County Register	3	6	0	0	4	0
San Francisco Examiner	2	0	0	20	0	4
Daily News	2	6	0	0	3	0
Bakersfield Californian	2	0	0	0	8	0
San Diego Tribune	1	0	14	0	0	0
Other	44	29	31	31	55	56
None	9	10	11	9	11	7

* Based on weighted data to 000's.

Q.18c What newspapers do you subscribe to or frequently read?

The L.A. Times (30%), San Francisco Chronicle (12%), Sacramento Bee (7%), San Diego Union (6%), and Wall Street Journal (6%) were the only newspapers being subscribed to or frequently read by more than five percent of those interviewed. Not surprisingly, regional publications are read by a large percentage of respondents within the geographic boundaries of the publication. Sixty-seven percent of Los Angeles residents read the L.A. Times, 57 percent of San Francisco residents read the San Francisco Chronicle, and 59 percent of San Diego residents read the San Diego Union.

CRITERION

EXHIBIT 25

NUMBER OF DAYS PER WEEK TELEVISION IS WATCHED DURING SPECIFIC TIME PERIODS

(Base: Students, retired people, and respondents from households over $25,000)

- Mean Values -

Viewing Times	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
7 a.m. - 9 a.m.	2.1	2.2	2.1	1.3	2.2	2.0
9 a.m. - Noon	1.1	1.2	1.1	0.7	1.1	0.9
Noon - 1 p.m.	1.1	1.1	1.0	0.7	1.2	1.1
1 p.m. - 5 p.m.	1.7	1.8	1.8	1.2	1.6	1.6
5 p.m. - 7 p.m.	4.0	4.0	4.2	3.3	3.9	4.2
7 p.m. - 10 p.m.	4.7	4.7	4.7	4.3	4.9	4.8
10 p.m. - Midnight	2.2	2.5	2.0	2.2	2.1	2.0

* Based on weighted data to 000's.

Q.19 Think now for a moment about your television viewing habits. How many days a week are you likely to watch television between .....?

Not surprisingly, the most frequently watched television time period is 7 p.m. to 10 p.m. (watched, on average, 4.7 days per week) and 5 p.m. to 7 p.m. (watched, on average, 4.0 days per week).

San Francisco residents and older respondents, in general, estimate they watch television less than individuals from the other California regions and younger respondents. Women estimate they watch more television than men in all time periods except 10 p.m. to midnight. Retired individuals are the heaviest consumers of television among market segments.

EXHIBIT 26

NUMBER OF DAYS PER WEEK SPECIFIC TYPES OF TELEVISION PROGRAMS ARE WATCHED

(Base: Students, retired people, and respondents from households over $25,000)

- Mean Values -

Television Programs	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
News	5.0	5.1	5.0	4.6	5.2	5.0
Sitcoms	2.4	2.3	2.4	1.8	2.5	2.4
Documentaries	1.9	1.8	2.1	1.8	2.0	2.0
Sports	1.8	1.9	1.7	1.8	1.9	1.8
Network Movies	1.8	1.9	1.8	1.5	1.9	1.8
Action/Crime Shows	1.7	1.8	1.6	1.2	1.7	1.6
One Hour Dramas	1.6	1.8	1.6	1.3	1.6	1.5
Nature Shows	1.6	1.4	1.7	1.5	1.7	1.7
Game Shows	1.3	1.2	1.2	1.2	1.2	1.4
Specials	1.2	1.2	1.2	1.2	1.3	1.2
Daytime Soaps	0.7	0.6	0.7	0.5	0.6	0.7
Evening Soaps	0.4	0.4	0.4	0.2	0.3	0.4

* Based on weighted data to 000's.

Q.20 How many days a week do you watch ..... ?

News is watched for the most days (on average, 5.0 days per week), followed by sitcoms (2.4 days per week), documentaries (1.9 days per week), sports (1.8 days per week), and network movies (1.8 days per week).

All subgroups watch news frequently though retired people, empty nesters, and those 55 years or older are the heaviest consumers of news, documentaries, and network movies. Situation comedies, on the other hand, are most popular with students and the under 35 year olds (2.7 and 2.8 days per week, respectively). Men (2.3 days a week, on average) watch sports considerably more than women (1.5 days a week, on average). Women watch evening and daytime soaps, game shows, and one hour dramas more frequently than men.

CRITERION

3.6 ALBERTA VACATIONS

EXHIBIT 27

AWARENESS OF ALBERTA LOCATIONS FOR A VACATION TRIP

(Base: Students, retired people, and respondents from households with incomes over $25,000)

Locations	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	24955	7406	2088	1359	5716	8385
	%	%	%	%	%	%
Net Alberta	91	91	91	92	91	91
Alberta	73	72	72	79	74	73
Calgary	79	77	79	84	78	81
Edmonton	56	58	56	62	55	53
Banff	44	41	45	62	42	45
Lake Louise	53	54	53	62	51	52
Jasper	45	43	49	55	45	44
Canadian Rockies	77	75	79	78	76	77

* Based on weighted data to 000's.

Q.21 Have you heard of ..... as a place for a vacation trip?

In total, 91 percent had heard of Alberta or a particular destination in Alberta as a place for a vacation trip. On overall awareness, there was virtually no difference between geographic regions. However, only 73 percent said they were aware of Alberta, suggesting that some are aware of destinations within Alberta (i.e. Calgary and the Canadian Rockies) but are unaware that these destinations are, in fact, in Alberta.

Of specific destinations, Calgary was best known (79%), probably because of the winter Olympics. Seventy-seven percent of the sample were aware of the Canadian Rockies followed by Edmonton (56%), Lake Louise (53%), Jasper (45%), and Banff (44%).

San Franciscans, empty nesters, retired people, and men were most aware of Alberta destinations, in general, as vacation locations.

EXHIBIT 28

DESCRIPTION OF ALBERTA'S LOCATION

(Base: Students, retired people, and respondents from households over $25,000 who are aware of Alberta as a vacation destination)

Description	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	22660	6702	1899	1247	5174	7638
	%	%	%	%	%	
It's in Canada	66	68	68	67	67	64
East of B.C.	8	7	5	9	7	9
Western Canada	8	8	9	9	8	8
North of Montana	6	5	7	7	7	7
North	5	6	5	3	5	5
Between B.C. & Sask.	2	2	2	2	2	2
In the West	2	2	3	1	1	2
In the Canadian Rockies	1	1	1	1	1	1

* Based on weighted data to 000's.

Q.22 You mentioned you've heard of Alberta or some places in Alberta as a place to visit for a vacation trip. Where is Alberta located?

With little variation between geographic regions, a large majority of respondents were very general in their description of Alberta's location for 66 percent, in total, simply said it is in Canada. However, 8 percent each said it is east of British Columbia or in western Canada. North of Montana was the response provided by 6 percent, and just "north" by 5 percent of those who claimed to be aware of Alberta as a vacation destination.

CRITERION

EXHIBIT 29

PAST AND LAST 12 MONTHS VACATION DESTINATIONS

(Base: Students, retired people, and respondents from households over $25,000 who are aware of Alberta as a vacation destination)

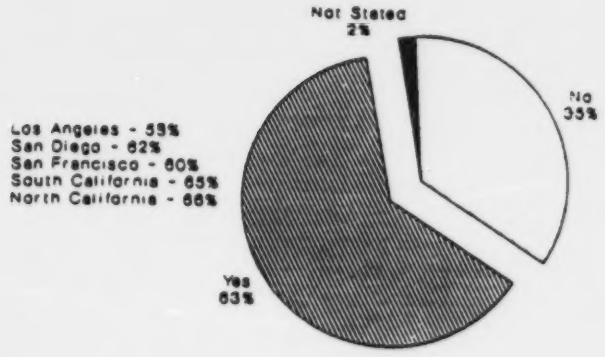
	Total		Los Angeles		San Diego		San Francisco		South California		North California	
n=Weighted*	22660		6702		1899		1247		5174		7638	
n=Unweighted**	3183		693		542		521		706		721	
	Ever	Last 12 months	Ever	Last 12 months	Ever	Last 12 months	Ever	Last 12 months	Ever	Last 12 months	Ever	Last 12 months
	%	%	%	%	%	%	%	%	%	%	%	%
Alberta	14	2	14	2	14	2	19	2	15	2	13	2
Calgary	14	2	14	2	15	2	17	2	15	2	13	2
Edm.	8	1	8	2	7	1	9	2	9	1	7	1
Banff	15	2	14	2	18	1	22	2	15	2	15	1
L. Louise	16	2	15	2	17	1	22	2	16	2	15	2
Jasper	11	1	11	1	12	2	15	2	11	1	10	1
Canadian Rockies	16	2	15	1	18	1	20	2	16	2	17	2
Alberta (net)	27	4	24	4	30	5	31	4	27	4	27	3
B.C.	32	4	30	4	32	4	38	6	28	4	35	5
Whistler	3	1	2	0	2	1	7	3	2	1	3	1
Vale/Aspen	20	4	20	4	27	3	18	5	24	4	17	3
Whitefish or Big Sky	10	2	8	2	11	1	11	4	11	1	11	

* Weighted - based on weighted data to 000's.

** Unweighted - based on number of actual interviews.

EXHIBIT 30

AWARENESS OF CALGARY STAMPEDE
(Base: Students, retired people and respondents from households over $25,000)
n=24955•



• Based on weighted data to 000's.

Q.24a Have you ever heard of the Calgary Stampede?

Sixty-three percent of all California residents were aware of the Calgary Stampede with northern California residents being most aware (66%) and San Francisco residents least aware (60%).

Students had a very low awareness of the Calgary Stampede (34%) compared to other market segments and retired individuals had an especially high awareness (81%). Men, as well, were considerably more aware of the event than women (71% compared to 56%).

CRITERION

EXHIBIT 31

SOURCE OF AWARENESS FOR CALGARY STAMPEDE

(Base: Students, retired people, and respondents from households over $25,000 who are aware of the Calgary Stampede)

Source	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	15610	4266	1299	817	3688	5541
	%	%	%	%	%	%
Friends/Relatives	27	28	26	24	29	25
Advertising	27	28	31	24	27	25
Travel	5	5	4	10	4	4

* Based on weighted data to 000's.

Q.24b How did you hear of the Calgary Stampede?

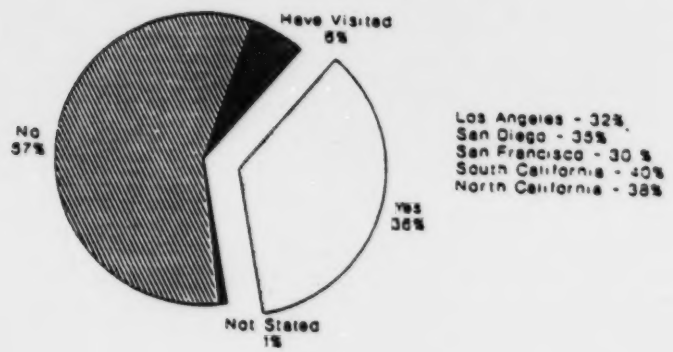
Friends/relatives and advertising were the two sources contributing most to the awareness of the Calgary Stampede (27% each). Travel experiences, mentioned by 5 percent of aware individuals, was the only other source given by a substantial number of respondents.

There was little difference between subgroups although travel experiences appeared to have a greater impact among San Francisco residents.

CRITERION

EXHIBIT 32

PERCENTAGE OF RESPONDENTS WHO HAVE CONSIDERED VISITING THE CALGARY STAMPEDE
n=15610•



• Based on weighted data to 000's.

Q.24c Have you ever considered visiting the Calgary Stampede?

Six percent of those who are aware of the Calgary Stampede have already attended this event, 36 percent have considered going, and 57 percent have not entertained the idea.

Southern California residents were most likely to say they have considered visiting the Calgary Stampede (40%) and San Francisco residents were least likely to have considered a visit (30%). By market segment, families were the most interested (39%) and students were the least interested (23%) in going to the Stampede.

CRITERION

EXHIBIT 33

RELATIVE IMPORTANCE OF VARIOUS FEATURES OF THE CALGARY STAMPEDE IN THE DECISION MAKING PROCESS

(Base: Respondents who have considered visiting the Calgary Stampede)

- Mean Values -

Feature	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	6480	1671	529	292	1637	2351
Rocky Mountain Scenery	4.6	4.5	4.5	4.4	4.6	4.6
Hospitality/Western Experience	4.0	4.1	4.0	3.8	4.0	4.1
Rodeo or Cowboys	3.8	3.6	3.6	3.8	3.8	4.0
Music or Entertainment	3.5	3.5	3.3	3.4	3.6	3.5
City Wide Celebration	3.5	3.5	3.4	3.3	3.5	3.4
Chuckwagon Races	3.4	3.3	3.1	3.3	3.4	3.5
Indians	3.3	3.2	3.1	3.3	3.3	3.4
Fair or Midway	2.9	3.1	3.0	2.6	2.9	2.8
Agriculture Showcase	2.8	2.7	2.5	2.4	2.8	2.9

* Based on weighted data to 000's.

Q.24d If you were to visit the Calgary Stampede, on a scale of 1 to 5 where 1 is very unimportant and 5 is very important, how important would the ..... be in your decision to attend?

When presented with a series of experiences provided by the Calgary Stampede, California residents, across almost all geographic regions, rated rocky mountain scenery and hospitality/ western experience as the two most likely features to influence their decision to attend (mean 4.6 and 4.0, respectively). The two features least likely to impact upon attendance were the agricultural showcase (mean 2.8) and the fair or midway (mean 2.9). Again, geographically, these results are consistent.

EXHIBIT 34

YEAR OF LAST VISIT TO ALBERTA

(Base: Students, retired people, and respondents from households over $25,000 who have travelled to Alberta in the past, before 1989)

Year	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	5182	1374	478	331	1209	1790
	%	%	%	%	%	%
1989	1	1	2	1	1	0
1988	6	7	4	7	7	5
1987	5	3	6	8	6	5
1986	6	6	5	2	5	7
1981 - 1985	20	21	16	22	20	19
1976 - 1980	17	17	19	20	14	17
Up to 1975	30	29	27	29	31	31

* Based on weighted data to 000's.

Q.25 In what year did you last visit Alberta?

Thirty percent of California residents who have visited Alberta did so more than 15 years ago, while 17 percent last visited Alberta between 1976 and 1980, and 20 percent visited between 1981 and 1985. Five or six percent said they visited Alberta in each of 1986, 1987, or 1988.

CRITERION

EXHIBIT 35

TRIP TYPE OF LAST VISIT TO ALBERTA

(Base: Students, retired people, and respondents from households over $25,000 who have ever travelled to Alberta in the past)

Type of Vacation	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	6048	1629	570	383	1393	2074
	%	%	%	%	%	%
Touring	40	35	41	36	43	41
Outdoor	21	25	18	19	19	21
Visit to Friends/ Relatives	8	7	6	9	10	8
Combined Business and Pleasure	5	7	4	3	2	6
Resort	4	6	4	8	5	2
Business/Convention	3	1	4	2	3	4
City or Town	2	2	1	5	3	1
Golfing	0	0	1	1	0	1

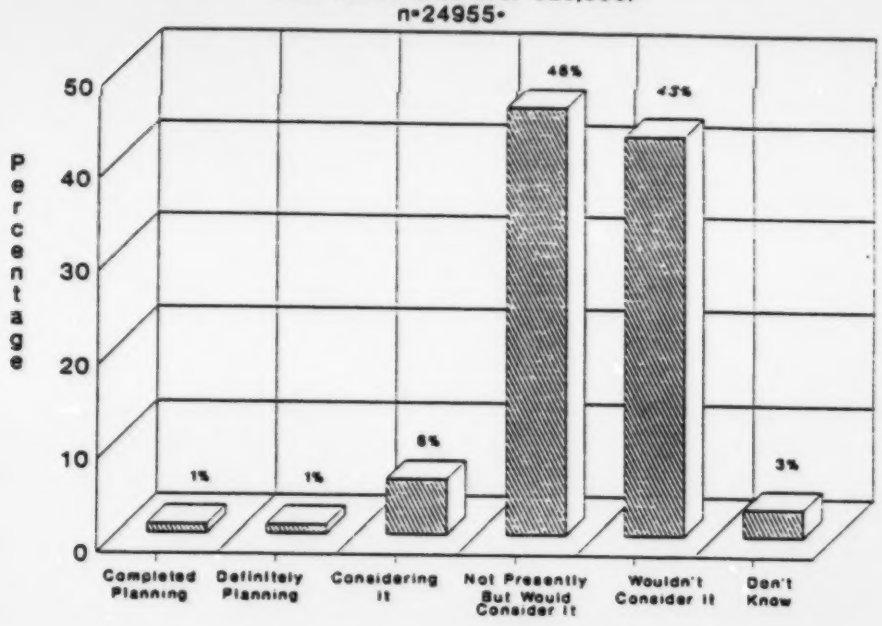
* Based on weighted data to 000's.

Q.26 Thinking of your last Alberta trip, which one trip type defined below best describes the kind of trip you took? Was it .....?

The largest percentage of respondents categorized their last Alberta trip as a touring trip, with empty nesters, retired people, over 55 year olds, and females being the most likely to do so. Demographically, the opposite is true for the 21 percent who took an outdoor vacation trip to Alberta. Families, students, and men were the most likely to have taken an outdoor vacation to Alberta.

Eight percent, in total, said they had visited friends or relatives, 5 percent had combined business and pleasure, 4 percent had stayed at a resort, 3 percent had attended a meeting or convention, 2 percent had taken a city trip, and less than 1 percent (0.4%) said they had taken a golfing holiday. Respondents in San Diego, northern California and San Francisco reported having taken a golfing holiday more frequently than respondents from other regions (1.2%, 0.6%, and 0.5%, respectively).

EXHIBIT 36
LIKELIHOOD OF TRAVELLING TO ALBERTA IN THE NEXT 12 MONTHS
(Base: Students, retired people and respondents from households over $25,000)
n=24955*



* Based on weighted data to 000's.

Q.27 Which of the following statements best describes your likelihood of travelling to Alberta in the next 12 months; I've already completed planning for a trip. I'm definitely planning on it. I'm considering it, I'm not presently, but would consider it, or I wouldn't consider it.

One percent, each, said they have completed or are definitely planning a trip to Alberta. A further 6 percent said they are considering it, 46 percent said they are not presently but would consider it, and 43 percent said they would not consider a trip to Alberta in the next 12 months.

Across geographic regions, there were no significant differences but, between market segments, empty nesters (specifically those who are retired) were approximately twice as likely to have completed or to be definitely planning a trip to Alberta than other segments.

EXHIBIT 37

TRIP TYPE OF PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Type of Vacation	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	%
Outdoor	37	30	45	41	56	32
Touring	26	19	32	8	11	36
Visit to Friends/ Relatives	15	13	23	15	16	14
Resort	8	22	0	29	0	0
Golfing	2	9	0	0	0	0
Business/Convention	0	0	0	8	0	0

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.28 What is the main purpose of this trip you are planning to Alberta? Would it be an outdoor vacation, a resort vacation, a touring vacation, a town or city trip, a visit to friends or relatives, a business or convention trip, a combined business and pleasure trip, or a golfing holiday?

Over one-quarter of the respondents, each, categorized their planned trip as an outdoor vacation (37%) or a touring vacation (26%). Southern California residents were more likely than others to classify their trip as outdoor (56%) but northern California residents said they were planning a touring vacation (36%) in the largest numbers. Fifteen percent planned to visit friends or relatives, 8 percent were planning a resort vacation, 2 percent a golfing holiday, and less than 1 percent were coming to Alberta for a convention or business. No one reported they will be taking a combined business and pleasure trip to Alberta.

CRITERION

EXHIBIT 38

TOTAL NUMBER OF DAYS OF PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Total Number of Days	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	%
1 - 6	19	27	12	0	12	20
7	12	16	0	7	17	11
8 - 13	17	21	22	8	6	20
14	13	14	32	29	23	3
15 - 21	15	0	23	11	21	22
Over 21	16	14	12	19	22	14
Not Stated	9	9	0	27	0	11
Mean	16.1	11.5	14.8	25.2	24.3	14.9

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.29a How many days will the complete trip take?

Almost two-thirds of those planning to visit Alberta said their total planned vacation will be two weeks or less, while 31 percent will have a holiday in excess of two weeks (15%, 15-21 days; 16%, more than 21 days). The average length of the total vacation is estimated to be 16 days.

It would seem that older respondents are more likely to take extended vacations in comparison to younger individuals.

CRITERION

EXHIBIT 39

NUMBER OF DAYS TO BE SPENT IN ALBERTA ON PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Total Number of Days	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	%
1 or Less	14	8	0	0	10	23
2	8	0	10	0	0	16
3	6	0	10	8	6	8
4	12	25	12	0	12	5
5	23	35	35	0	39	11
7	10	0	12	37	6	14
7+	13	19	22	7	17	6
Mean	6.1	8.3	5.6	6.7	6.7	4.6

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.29b How many days do you think you will spend in Alberta?

Approximately two-thirds of respondents, who are planning a trip to Alberta in the next 12 months, said they will stay less than 7 days. Ten percent of these visitors reported they will spend 7 days in the province and 13 percent plan to stay in excess of 7 days. The average stay will be approximately 6 days.

EXHIBIT 40

NUMBER OF DAYS TO BE SPENT IN THE ROCKY MOUNTAINS ON PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Total Number of Days	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	% %
None	12	24	12	15	0	9
1	8	0	10	0	27	6
2	15	13	10	7	6	21
3	8	5	0	0	12	11
4 - 5	6	0	12	19	0	9
7	10	0	22	11	23	9
10	5	9	12	0	11	0
10+	7	14	12	11	0	3
Mean	5.1	8.2	5.7	5.3	4.4	3.4

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.29c How many days will you spend in the Rocky Mountains?

Twelve percent of the individuals asked this question said they will not spend any time in the Rocky Mountains, 8 percent will spend 1 day, and 15 percent will stay for 2 days. Almost one-quarter (22%) will spend one week or longer in the mountains. The average mountain stay will be 5 days, although Los Angeles respondents estimate they will stay approximately 8 days and northern California residents will spend just over 3 days in the mountains.

CRITERION

EXHIBIT 41

NUMBER OF PEOPLE TO BE ON PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

No. of People	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	%
1	20	35	12	19	17	14
2	51	27	68	45	67	56
3	17	30	10	0	6	16
4	6	0	0	18	10	8
5 - 6	3	0	10	0	0	5
Mean	2.2	1.9	2.4	2.2	2.1	2.3

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.30 How many members of your household, including yourself, will be included on this trip?

Twenty percent of those planning a trip to Alberta said they will travel by themselves, while 51 percent will travel in pairs. The remaining one-quarter of travellers will comprise a party of three (17%), four (6%), or five or more (3%). As reported, the average party of visitors will be 2.2 individuals.

EXHIBIT 42

TYPE OF TRANSPORTATION TO BE USED ON PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Transportation Type	Total	Los Angeles	San Diego	San Francisco	San California	South California	North
n=Weighted**	514	138	36	28	82	230	
n=Unweighted***	66	14	9	11	12	20	
	%	%	%	%	%	%	
Own Car	40	17	32	38	17	62	
Airplane/Rental Vehicle	17	38	23	16	17	3	
Own Camper/R.V.	16	9	35	11	45	9	
Airplane	15	24	10	18	11	11	
Other	10	13	0	11	10	9	

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.31 What method of transportation best describes what you are planning to use for this vacation?

Forty percent said they were going to travel in their own car. This was the preferred mode of transportation especially for northern California residents (62%). Campers or recreational vehicles will be used by 16 percent (45% of southern California residents and 35% of San Diego residents). A further 32 percent will fly, with 17 percent reporting they will then rent a vehicle to travel within the province.

CRITERION

EXHIBIT 43

TYPE OF ACCOMMODATIONS TO BE USED ON PLANNED VISIT TO ALBERTA*

(Base: Students, retired people, and respondents from households over $25,000 who have completed planning or are definitely planning a trip to Alberta in the next 12 months)

Accommodation	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=Weighted**	514	138	36	28	82	230
n=Unweighted***	66	14	9	11	12	20
	%	%	%	%	%	%
Luxury Hotel	17	33	0	16	27	6
Budget Hotel	12	17	20	8	6	11
Camping/Camper	16	0	22	26	11	26
Recreational Vehicle	15	16	23	0	34	9
Friends/Relatives	7	10	12	7	0	6
Motel	14	5	12	11	6	23
Other/Lodge	9	10	12	8	6	9

* Interpret with caution due to small cell sizes.
** Based on weighted data to 000's.
*** Based on number of actual interviews.

Q.32 What type of accommodations will you mainly use while you are in Alberta?

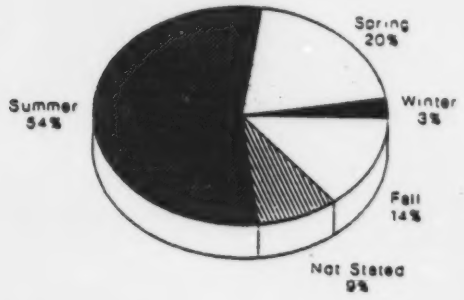
The largest percentage of respondents reported they will stay in luxury hotels while in Alberta (17%). This is especially true among Los Angeles residents (33%) and southern California residents (27%). Campers will be used by 16 percent (especially San Francisco and northern California residents) and recreational vehicles by 15 percent (particularly southern California residents). Fourteen percent will stay in motels, 12 percent in budget hotels, and 7 percent with friends or relatives. Nine percent will use some kind of alternate accommodations.

CRITERION

EXHIBIT 44

LIKELY SEASON OF PLANNED VISIT TO ALBERTA

(Base: Respondents who have completed planning or are definitely planning a trip to Alberta in the next 12 months)
Weighted n=514•
Unweighted n=66••



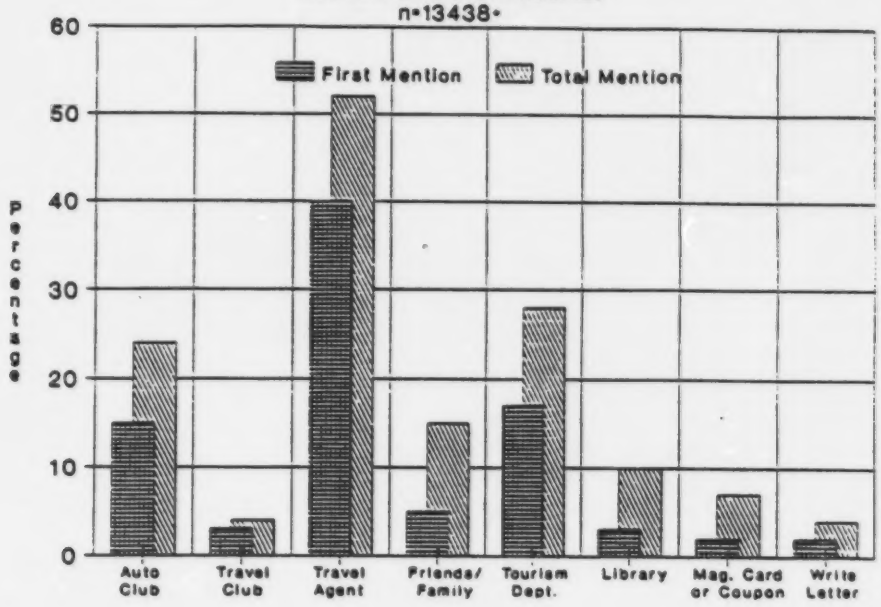
• Based on weighted data to 000's.
•• Based on number of actual interviews.

Q.34 Will your Alberta vacation likely occur in spring, summer, fall, or winter?

More than half of the respondents who are planning to visit Alberta in the next 12 months will do so in the summer (54%). Twenty percent will visit in the spring, 14 percent in the fall, and only 3 percent in the winter. All those who said they would visit in the winter were men under 35 years of age. Families are far less likely to travel in the spring than 18 to 44 year olds with no children or empty nesters (4% compared to 26% and 24%, respectively). Summer travel is relatively consistent across market segments. Families are more likely to travel in the fall than either 18 to 44 year olds with no children or empty nesters (43% compared to 12% and 4%, respectively).

CRITERION

EXHIBIT 45
LIKELY INFORMATION SOURCE FOR TRIP TO ALBERTA
(Base: Respondents who have taken a trip and are aware of Alberta)
n=13438*



* Based on weighted data to 000's.

Q.35 If you were planning a trip to Alberta, Canada, how would you collect the information you needed?

Travel agents, tourism departments, automobile clubs, and friends or family are the most common sources that potential visitors would access (total mentions: 52%, 28%, 24%, and 15%, respectively).

Travel agents were mentioned most frequently by 18 to 44 year olds without children (60%), students (68%), those under 35 years of age (61%), and women (55%).

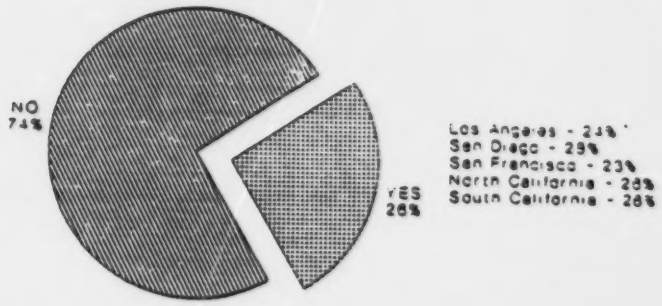
Contacting Alberta Tourism or a government department was mentioned most often by empty nesters (33%), retired people (37%), and men (31%).

Automobile clubs are <u>not</u> used as often by the childless young (18%), students (17%), and men (21%) as by other subgroups.

EXHIBIT 46

PERCENTAGE OF RESPONDENTS LIKELY TO CONSIDER GOLFING AT VARIOUS RESORTS AS PART OF AN ALBERTA TRIP

(Base: Respondents who are aware of Alberta)
n=13438•



• Based on weighted data to 000's.

Q.36 If vacationing in the Canadian Rockies, would you or someone in your household consider golfing at various resorts as part of your trip?

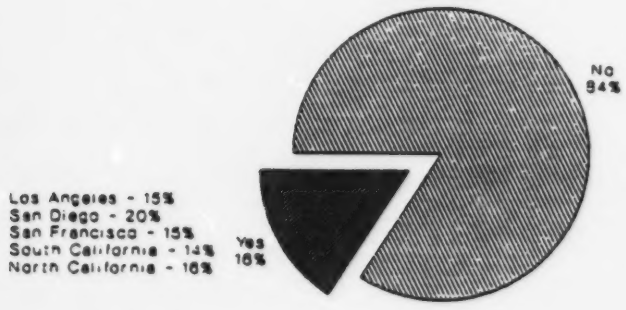
If a Canadian Rockies vacation occurred, 26 percent said they or someone in their household would consider golfing at various resorts in the course of the trip. As age increased, the interest in golf decreased (30%, under 35 years of age; 28%, 35-54 years of age; 18%, 55 years or older). Men, as well, were somewhat more likely than women to say someone in the household would golf on a Canadian Rockies vacation (29% and 23%, respectively).

CARTER-RICK

EXHIBIT 47

PERCENTAGE OF RESPONDENTS LIKELY TO CONSIDER A GOLF TOUR TO VARIOUS RESORTS IN THE CANADIAN ROCKIES

(Base: Respondents who are aware of Alberta)
n=13438•



• **Based on weighted data to 000's.**

Q.37 Would you or someone in your household consider a golf tour vacation at various resorts in the Canadian Rockies?

Compared to the percentage of respondents who would consider golfing while on vacation, the percentage who would consider a golf tour is 10 percent lower (16%). San Diego respondents were most interested while southern California residents were least interested (20% and 14%, respectively).

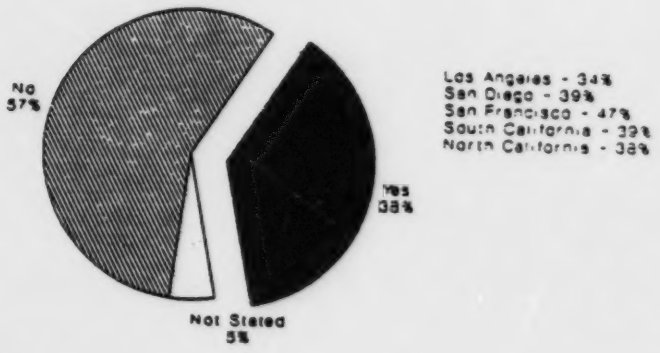
CRITERION

EXHIBIT 48

PERCENTAGE OF RESPONDENTS RECALLING ADVERTISING FOR ALBERTA IN PAST TWELVE MONTHS

(Base: Students, retired people and respondents from households over $25,000)

n=24955•



• **Based on weighted data to 000's.**

Q.38 In the past 12 months have you seen or heard any advertising for Alberta?

Thirty-eight percent of respondents recalled advertising for Alberta in the past twelve months. San Francisco residents were the most likely to recall Alberta advertising (47%) and Los Angeles residents were least likely to do so (34%). There was a considerable difference between students and retired individuals who recalled advertising for Alberta in the past 12 months (23% compared to 37%). Males, too, were more likely to report they had seen Alberta advertising than females (42% and 34%, respectively).

CRITERION

EXHIBIT 49

SOURCE OF ADVERTISING RECALL

(Base: Those who recall some Alberta advertising in past 12 months)

Media	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	9449	2541	809	638	2237	3223
	%	%	%	%	%	%
Television	61	64	61	54	66	56
Magazines	53	41	52	62	55	61
Newspaper	16	23	17	14	14	11
Radio	2	2	1	3	2	1
Billboard	1	3	4	1	1	0
Posters	1	1	1	2	1	0
Other	10	10	8	4	8	13

* Based on weighted data to 000's.

Q.39 Where did you see or hear this advertising?

Television and magazine advertising was recalled most frequently (61% and 53%, respectively). Television's impact was greatest in southern California and Los Angeles while magazines were recalled more frequently by San Francisco residents (62%) and northern California residents (61%). In total, 16 percent recalled advertising from newspapers (especially in Los Angeles). Radio, billboards, and posters received extremely low response rates of 1 or 2 percent each.

As age increased, recall of magazine and newspaper advertising increased. This difference is especially marked when the percentage of students who recalled magazine advertising is compared to retired response rates (36% versus 63%). Television, on the other hand, is recalled considerably more frequently by younger respondents than older ones (under 35 years, 74%; 55 years or older, 45%).

3.7 BACKGROUND INFORMATION

EXHIBIT 51

RACE OR ETHNIC BACKGROUND

(Base: Total Sample and U.S. Census)**

Race	Total		Los Angeles		San Diego		San Francisco		South California		North California	
n=*	29064 %		8710 %		2460 %		1599 %		6629 %		9666 %	
	Surv	Cen	Surv	Cen	Surv	Cen	Surv	Cen	Surv	Cen	Surv	Cen
Caucasian/White	79	77	66	68	87	81	80	71	85	80	84	83
Black/African American	7	8	16	13	3	6	6	9	2	6	4	3
Hispanic/Central American	6	9	9	--	4	--	4	--	7	--	4	--
Asian/Pacific Islander***	3	5	4	6	2	4	7	13	2	5	3	1
Native American	3	1	3	1	2	1	1	1	2	1	4	1
Other	1	2	2	1	1	1	1	1	1	1	1	1
Not Stated	1	--	1	--	1	--	2	--	1	--	1	--

* Based on weighted data to 000's.
** Census - 1980 U.S. Census, Persosn by Race
*** Includes Japanese, Chinese, Filipino, Korean, Asian Indian, and Vietnamese

Q.49 Which of the following categories best describes your race or ethnic background?

Almost four-fifths of the total sample were Caucasian or white with 7 percent being black or African American, 6 percent being Hispanic or Central American, 3 percent each being Asian Pacific Islander and Native American.

Los Angeles had the largest percentage of Black or African American (16%) and Hispanic or Central American (9%). On the other hand, San Francisco had the largest percentage of Asians or Pacific Islanders (7%).

CRITERION

EXHIBIT 52

TOTAL HOUSEHOLD INCOME BEFORE TAXES

(Base: Total Sample)

Income	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	%
Less than $25,000	20	20	21	16	19	21
$25,000 - $30,000	14	13	14	11	13	14
$30,000 - $40,000	15	14	16	12	16	16
$40,000 - $50,000	13	13	15	11	13	13
$50,000 - $60,000	10	9	9	9	10	10
$60,000 - $70,000	6	6	5	8	5	6
$70,000 or more	13	13	12	20	13	11

* Based on weighted data to 000's.

Q.50 Was your total annual household income before taxes in 1989 .....?

Twenty percent of the sample had incomes less than $25,000, while 29 percent had incomes between $25,000 and $40,000 and 23 percent had incomes between $40,000 and $60,000. Nineteen percent had incomes in excess of $60,000.

CRITERION

EXHIBIT 53

OCCUPATIONS OF CHIEF WAGE EARNERS

(Base: Total Sample)

Occupation	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	%
Professional	25	25	26	27	24	24
Skilled Labour	19	19	19	11	19	21
Business Executive	16	17	15	16	16	16
Clerical	10	11	8	10	9	9
Sales	7	8	8	12	8	6
Labourers/Service	7	7	7	4	8	7
Housewife	1	1	1	0	1	1
Student	1	0	1	1	1	1
Other	13	11	13	13	13	13

* Based on weighted data to 000's.

Twenty-five percent of the sample were professionals, 19 percent were skilled labor, 16 percent were business executives, and 10 percent were clerical.

CRITERION

EXHIBIT 54

GENDER

(Base: Total Sample)

Gender & Age	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	%
Males						
24 Years or Under	6	4	4	3	5	11
25 - 29	8	5	4	4	5	14
30 - 34	4	5	5	3	4	3
35 - 39	5	6	6	2	5	4
40 - 44	4	4	4	2	4	3
45 - 49	2	2	3	3	3	2
50 - 54	3	4	3	1	3	3
55 - 59	2	3	2	1	3	2
60 - 64	2	3	3	1	3	1
65 - 69	2	3	3	1	3	2
70 - 74	2	2	1	1	2	1
75 years +	1	2	2	0	1	1
Females						
24 Years or Under	5	5	5	2	5	4
25 - 29	4	5	7	3	5	3
30 - 34	7	8	9	3	7	7
35 - 39	6	6	5	4	8	5
40 - 44	5	6	6	4	6	4
45 - 49	4	3	3	3	5	3
50 - 54	3	4	2	2	3	3
55 - 59	2	3	3	1	3	2
60 - 64	4	4	4	1	6	3
65 - 69	4	5	5	2	4	3
70 - 74	2	2	3	1	3	2
75 years +	3	3	5	2	3	2

* Based on weighted data to 000's.

The exhibit, above, provides a breakdown of the sample by age and gender.

CRITERION

EXHIBIT 55

EDUCATION LEVEL

(Base: Total Sample)

Education Level	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	
Less than High School	5	5	3	2	5	5
Completed High School	25	24	23	21	26	25
Community College/ Junior College	10	10	9	8	11	10
Some College/University	21	21	22	18	23	21
Completed College/ University	26	28	28	33	23	24
Post-graduate	13	12	15	17	12	14

* Based on weighted data to 000's.

Thirty-nine percent of this sample had at least one university degree, 21 percent had some college or university, 10 percent had a community or junior college education, 25 percent completed high school, and 5 percent had less than high school.

EXHIBIT 56

HOUSEHOLD SIZE

(Base: Total Sample)

Household Size	Total	Los Angeles	San Diego	San Francisco	South California	North California
n=*	29064	8710	2460	1599	6629	9666
	%	%	%	%	%	%
1	16	18	16	20	13	16
2	33	30	37	38	34	32
3	18	17	20	16	19	18
More than 3	27	27	24	23	28	28
Means	2.8	2.8	2.7	2.6	2.9	2.8

* Based on weighted data to 000's.

CRITERION

EXHIBIT 57

NUMBER OF CHILDREN IN HOUSEHOLD

(Base: Households reporting more than one member)

TOTAL

	Any Under 6 years old %	Any 6 - 12 years %	Any 13 - 17 years %
Total	23	22	18
Los Angeles	23	23	17
San Diego	23	21	15
San Francisco	19	17	10
Southern California	22	23	19
Northern California	25	22	19

CRITERION

EXHIBIT 58

NUMBER OF WAGE EARNERS IN HOUSEHOLDS

(Base: Total Sample)

	Total %	Los Angeles %	San Diego %	San Francisco %	South California %	North California %
One	40	41	40	43	38	40
Two	39	37	40	37	40	41
Three or More	10	12	9	11	10	8
None	9	8	10	7	12	9

CRITERION

4. CONCLUSIONS

California residents travel extensively with three-quarters of them reporting having taken a vacation of at least two nights away from home in the past year. Of the total sample, 1.3 percent reported they have visited Alberta in the past 12 months, while 3.0 percent reported visiting Alberta or an Alberta location in the past 12 months. These percentages reflect a possible 389,000 or 867,000 visitors in the past year.

Just under 2 percent of the total sample report they have already completed planning or are definitely planning a trip to Alberta in the next 12 months (1.8%). This reflects just over one-half million (514,000) trips or 6,753,960 person days (an average of 6 days will be spent in Alberta by 2.19 people in a party). However, respondents are usually optimistic in their estimations of future behavior and, consequently, these numbers are undoubtedly inflated. However, in tracking planned travel behavior to actual travel behavior over a two year time span, the Alberta Tourism 1989 Conversion Study found that approximately 25 percent of respondents who had already completed planning or were definitely planning a trip to Alberta in 1988 actually took the trip in the next 12 months. Assuming, then, that 25 percent of the person days in this study are realized, California residents will spend 1,688,490 person days in Alberta in the next year (128,500 trips).

By market segment, the projected number of person days breaks down as follows revealing that empty nesters are the most converted to travelling to Alberta in the next 12 months. The position of the other two market segments is less positive.

a.	18 to 44 year olds without children at home	1,340,280 x 25% = 335,070 person days
b.	Families	1,340,280 x 25% = 335,070 person days
c.	Empty nesters	4,060,260 x 25% = 1,015,065 person days

CRITERION

An examination of only the student and retired market also reinforces the strength of the existing retired market in potential person days to Alberta in the next 12 months.

Students	367,920 x 25% = 91,980 person days
Retired	1,511,100 x 25% = 377,775 person days

Specifically, the following information suggests that certain features of Alberta as a vacation make it attractive to California residents and can be used to develop marketing messages for potential visitors.

- Alberta is likely to appeal to the older or retired market because it offers opportunities for a touring type vacation and because those who take touring vacations, on average, are away for a longer time so the distance away would be less daunting.
- Alberta is likely to appeal to the 18 to 44 year old without children market because it offers an outdoor vacation experience. There is greater potential for fly-in vacations among respondents earning in excess of $40,000.
- Forty-four percent of California residents flew to a vacation destination of more than 1,000 miles away in the past year and approximately 35 percent drove out-of-state for a 5 night or more vacation.
- Those respondents most converted to travelling to Alberta rate natural beauty, value, and a sense of wilderness higher than the less converted.

Awareness of Alberta or some location in Alberta is high (91%), though continued efforts to raise awareness of "Alberta" in and of itself and of specific locations in Alberta (namely, Banff, Jasper, and Lake Louise) is necessary as some levels hover around the 50 percent mark.

Forty percent will travel in their own car, all types of accommodations will be used in equal proportions, and most will visit in the summer.

CRITERION

Fifty-four percent of California residents have heard of the Calgary Stampede, mostly from advertising or friends or relatives. Three percent have actually visited it and 19 percent have considered a visit. This event is likely to appeal to families, especially if the scenery, the hospitality, the western experience, and the cowboys and rodeo are featured in the communication materials.

There are several specific behaviors and attitudes prevalent among California residents where marketing messages might be targeted to change these behaviors and attitudes. They are:

- Alberta appears to appeal to families less than to other groups. These travellers are not interested, to any great extent, in touring vacations. Rather they prefer outdoor holidays with lots to see and do. It would seem that their impression of Alberta is that there are things to do but a visitor must travel to each one. Suggesting that one Alberta destination can offer all that is needed, like a variety of things to do and a place to relax, might overcome some of the resistance families have to take an Alberta vacation.

- Alberta is not the primary destination of a substantial percentage of visitors as less than 1 percent of the total sample specified an Alberta destination as their primary trip but 2 percent actually had been to Alberta in the past year. Perhaps it is treated as a pass through destination or as a destination for shorter trips.

- Overseas travel is popular. Alberta should position itself as an alternate destination which is closer to home and less expensive.

- Offering an alternate type of vacation other than visiting friends or relatives to the lower income, less converted individuals may result in a greater interest by these California residents in vacationing in Alberta.

Meeting the informational requirements of would-be visitors is necessary. Essential informational requirements center around accommodations, maps/routes, places to see and visit, transportation, weather, and costs. This information is mainly sought from travel agents and automobile clubs. Automobile club membership is over 50 percent with the Auto Club of Southern California having the largest membership (23%), followed by the California State Auto Association (18%), necessitating a supply of Alberta travel information be available to them.

CRITERION

Attendance at sports or activity shows is high (42% of the total sample) with individuals attending an average of 3.56 times in the past three years. Based upon opinions towards fairs and shows, it can be concluded that Alberta Tourism should be represented at consumer or sports (including ski) shows, while state fairs are likely to result in a lower return on investment.

The magazines which have the highest subscription and are read most thoroughly are Reader's Digest, National Geographic, Sunset Magazine, and Time Magazine. Backpacker, a special interest magazine, does not have an extensive circulation but is thoroughly read by those who subscribe to it. On the other hand, Motorland has a relatively high distribution but is not read thoroughly.

The newspapers which are likely to reach the greatest number of people are the L.A. Times, the San Francisco Chronicle, and the Sacramento Bee.

Almost one in four possible visitors or 12 percent of California residents would consider golfing as part of their vacation but only 10 percent actually said they did golf on their last primary vacation. Under 1 percent (0.07%) said they or someone in their household would consider a golf tour vacation at various resorts in the Canadian Rockies.

APPENDIX

FINAL - MAR. 6/90 SURVEY I.D. _____

CALIFORNIA MARKET POTENTIAL STUDY

Telephone: (_ _ _) _ _ _ - _ _ _ _ Project No.: 1810390

Good morning/afternoon/evening. My name is _____, and I am calling from Criterion Research Corp. in Canada. We are conducting a survey about attitudes towards travel.

A. RECORD LOCATION

LOS ANGELES 1
SAN DIEGO 2
SAN FRANCISCO 3
SOUTHERN CALIFORNIA .. 4
NORTHERN CALIFORNIA .. 5

B. May I speak to the person in your household who is over 18 years of age and whose birthday comes next?

C. Would that be you?

Yes ..... 1 - SKIP TO Q.1
No ..... 2 - CONTINUE

D. May I please speak to that person?

REINTRODUCE YOURSELF
Yes ..... 1 - AND SKIP TO Q.1
No ..... 2 - CONTINUE

E. Whom should I speak to and what is their relationship to you?

_____ - -

(IF SPOUSE OF SIGNIFICANT OTHER, COMPLETE INTERVIEW WITH PERSON WHO ANSWERED PHONE. IF A ROOMMATE, SON OR DAUGHTER OVER 18 YEARS OLD, COUSIN, AUNT, UNCLE, BOARDER, ETC., MAKE AN APPOINTMENT FOR A CALLBACK.)

1. Have you taken a vacation of at least two nights away from home in the past year?

Yes 1
No 2

2. Do you plan to take a vacation of at least two nights away from home in the next year?

Yes 1
No 2

CRITERION

3. Which of the following three categories best describes your household situation? Stop me when I reach the appropriate category.

a. Married or single, between 18 and 44 years old, with no children under 18 years of age at home. 01

b. Married or single with children under 18 years of age at home. 02

c. Married or single, 45 years of age or older with no children under 18 years of age at home. 03

4. Are you ...

a) working full time 1
b) working part time 2
c) a student 3
d) retired 4
e) unemployed, or 5
f) a full time homemaker 6
g) other 7

5. Is your total household income over $25,000.00?

Yes 1
No 2

NOTE QUOTAS - N=500 (UNDER $25,000 NOT A STUDENT OR RETIRED.)
N=3,600 (OVER $25,000, OR A STUDENT OR RETIRED.)

SECTION I - VACATION BEHAVIOR IN PAST 12 MONTHS

---

6. Now, I am going to describe four specific types of vacation trips that people commonly take. I would like you to think about the last 12 months (March to March) and tell me how many trips of each type you've taken.
The first type of trip has these characteristics:

The final destination was at least 1000 miles away from home. You flew and you spent 2 or more nights outside California.

How many trips of this type have you taken in the past year? _ _

7. The second type of trip has these characteristics:

The trip included 5 nights or more away from home, of which at least 3 nights were outside California and you drove.

How many trips of this type have you taken in the past year? _ _

CRITERION

8. The third type of trip has these characteristics:

The trip was taken within California during which you spent two nights or more away from home. This category includes both flying and driving trips.

How many trips of this type have you taken in the past year? _ _

9. Finally, how many other trips of at least 1000 miles away from home have you taken outside of California where you have combined both business and pleasure in the past year? _ _

IF NO TRIPS AT ALL BUT OVER $25,000, SKIP TO Q.15A

IF NO TRIPS AND LESS THAN $25,000, GO TO DEMOGRAPHICS

10a. I would like to ask you a few questions about the primary or main vacation trip you took in the past ~~12~~ months. In which month did you <u>begin</u> your primary vacation? (VERIFY YEAR)

10b. In what month did you finally <u>decide</u> upon your destination?

10c. In what month did you begin to <u>think</u> about where you would go?

	Q.10A Time of vacation	Q.10B Decision made	Q.10C When thought about it
Prior to July 88	01	01	01
July/Aug. 88	02	02	02
Sep./Oct. 88	03	03	03
Nov./Dec. 88	04	04	04
Jan. 89	05	05	05
Feb. 89	06	06	06
Mar. 89	07	07	07
Apr. 89	08	08	08
May 89	09	09	09
June 89	10	10	10
July 89	11	11	11
Aug. 89	12	12	12
Sep. 89	13	13	13
Oct. 89	14	14	14
Nov. 89	15	15	15
Dec. 89	16	16	16
Jan. 90	17	17	17
Feb. 90	18	18	18
Mar. 90	19	19	19

11a. On this trip, how many nights, in total, did you spend away from home?

- - -

CRITERION

(IF NO TRIPS TAKEN OUTSIDE CALIFORNIA IN Q.6, Q.7 OR Q.9, SKIP TO Q.11D)

11b. How many of these (INSERT RESPONSE FROM Q.11D) nights were spent outside California?

_ _ _

11c. Thinking still of the same trip, what was your main destination? (CIRCLE ONE RESPONSE ONLY)

Washington	01
Oregon	02
Nevada	03
Utah	04
Arizona	05
New Mexico	06
Texas	07
Montana	08
Alaska	09
Other Central U.S.	10
Eastern U.S.	11
Other U.S.	12
Mexico	13
Central/South America	14
Caribbean	15
Overseas	16
Alberta	17
British Columbia	18
Other Canada	19
Other (PLEASE SPECIFY)	
Not stated	99

11d. What two activities or experiences were you specifically seeking on this particular trip? (BE SPECIFIC)

_____ _ _

_____ _ _

11e. Was the primary purpose of this trip ...

Business	01
Vacation	02
A visit to friends or relatives	03
A convention; meeting or conference	04
Other (PLEASE SPECIFY)	
Not stated	99

CRITERION

(IF ONLY ONE TRIP TAKEN IN Q.6,7,8 OR 9, SKIP TO Q.13)

12. What features of this vacation make you consider it as your primary or main vacation?

_____ - -

_____ - -

_____ - -

(HOUSEHOLDS UNDER $25,000 AND NOT A STUDENT OR RETIRED, SKIP TO DEMOGRAPHICS.)

SECTION II - VACATION PLANNING

---

13. Vacationers chose a holiday destination for a variety of reasons. In making your decision about where to go for your last primary vacation, how important were the following features? On a scale of one to five where one represents not at all important and five represents very important, how important was/were ... (READ LIST - ROTATE) in your decision process.

		Not at all important				Very important	N/S
i.	Natural beauty	1	2	3	4	5	6
ii.	Resort areas	1	2	3	4	5	6
iii.	Sense of history	1	2	3	4	5	6
iv.	Adventure products such as river rafting, trail riding fly-in fishing, mountain climbing	1	2	3	4	5	6
v.	Cities and their attractions	1	2	3	4	5	6
vi.	High quality or luxury accommodations	1	2	3	4	5	6
vii.	Golf	1	2	3	4	5	6
viii.	Sense of wilderness	1	2	3	4	5	6
ix.	Something new and different	1	2	3	4	5	6
x.	Outdoor activities such as camping, hiking, mountain biking, etc.	1	2	3	4	5	6
xi.	A place to relax	1	2	3	4	5	6
xii.	Fully serviced campgrounds ..	1	2	3	4	5	6
xiii.	Distance to your destination	1	2	3	4	5	6
xiv.	Value for your dollar spent	1	2	3	4	5	6
xv.	Having lots of things to do	1	2	3	4	5	6

CRITERION

		Not at all important			Very important		N/S
xvi.	Shopping	1	2	3	4	5	6
xvii.	Downhill skiing	1	2	3	4	5	6
xviii.	Mountain scenery	1	2	3	4	5	6
xix.	Water experiences (such as swimming, sunbathing, boating, etc.)	1	2	3	4	5	6
xx.	Budget accommodations	1	2	3	4	5	6

14. While on your last primary trip, did you participate in any of the following activities? (READ LIST)

	Yes	No
Visit friends/relatives	1	2
Attend small town festivals, fairs, or events	1	2
Shopping	1	2
Sightseeing	1	2
Attend cultural events (i.e. plays/concerts)	1	2
Nightlife/recreational activities	1	2
Visit a zoo/museum/natural display	1	2
Visit a national park/state or provincial park/historic site	1	2
Attend a sports event	1	2
Short guided excursions/tours	1	2
Any water sports	1	2
Downhill skiing	1	2
Golf	1	2
Hiking	1	2
Trail riding	1	2
Whitewater rafting	1	2
Fly-in fishing	1	2
Fishing or hunting	1	2
Other adventurous activities	1	2

CRITERION

SECTION III - INFORMATIONAL NEEDS

15a. What type of trip information do you usually need to meet your planning requirements?

Hotels/motels	01
Restaurants	02
Campgrounds	03
RV facilities	04
Maps/routes	05
Golf courses	06
Places to visit/things to see and do	07
Other places to get information	08
Transportation information	09
City information/cities	10
Fishing	11
Skiing	12
Weather	13
Other (PLEASE SPECIFY) _____	
Not stated	99

15b. Where do you usually get any travel information you need when you're planning a trip? (CIRCLE ALL MENTIONS)

	Q.15B	Q.15C
Contact a tour operator or organizer	01	01
Motor coach or bus tour operator	02	02
Go to an automobile club	03	03
Go to a travel club	04	04
Talk to a travel agent	05	05
Call a 1-800 number	06	06
Mail in pop-up cards from a magazine	07	07
Mail in clip-out coupons from a magazine	08	08
Talk to friends or family	09	09
Contact a Government Tourism Department for literature	10	10
Go to the library	11	11
Hotel/resort/airline/tour operator brochures	12	12
Other (PLEASE SPECIFY) _____		
None	98	98
Don't know	99	99

15c. Did you use (INSERT "YES" RESPONSE FROM Q.15B) for your most recent primary vacation trip?

CRITERION

16a. Are you a member of an automobile club or association?

Yes ..... 1 - CONTINUE
No ..... 2] SKIP TO Q.17A
Not stated .... 3]

16b. Would that be the ..... (IF RESPONDENT SAYS AAA OR AMERICAN AUTOMOBILE ASSOCIATION, PROBE FOR WHICH BRANCH)

California State Auto Association ... 01
Auto Club of Southern California 02
Other (PLEASE SPECIFY)

_____

Not stated/don't know 99

17a. Have you ever attended ....

	Ever visited		Number of visits in 3 years
	Yes	No	
1. A consumer show which included travel information	1	2	
2. A sports or outdoor activity show ..	1	2	- -
3. The California State Fair	1	2	- -
4. The L.A. State Fair	1	2	- -
5. A ski show	1	2	- -
6. None of the above	1 - SKIP TO Q.18A	2	- -

17b. (FOR THOSE CATEGORIES IN Q.17A WITH A "YES" RESPONSE, ASK) How often in the past three years have you attended .... (INSERT CATEGORY)?

17c. On a scale of one to five, where one represents "not at all useful" and five represents "very useful," how useful do you consider (INSERT CATEGORY FROM Q.17A WITH A "YES" RESPONSE), in helping make future travel decisions?

CRITERION

17d. How useful are they in providing an opportunity to gather travel information? (REPEAT FOR EACH ACTIVITY WITH A "YES" RESPONSE IN Q.17A.)

	Not at all useful				Very useful	N/S
CONSUMER SHOWS						
in helping to make travel plans	1	2	3	4	5	6
in helping to gather travel information	1	2	3	4	5	6
SPORTS SHOW						
in helping to make travel plans	1	2	3	4	5	6
in helping to gather travel information	1	2	3	4	5	6
THE CALIFORNIA STATE FAIR						
in helping to make travel plans	1	2	3	4	5	6
in helping to gather travel information	1	2	3	4	5	6
THE L.A. STATE FAIR						
in helping to make travel plans	1	2	3	4	5	6
in helping to gather travel information	1	2	3	4	5	6
SKI SHOW						
in helping to make travel plans	1	2	3	4	5	6
in helping to gather travel information	1	2	3	4	5	6

CRITERION

SECTION IV - MEDIA BEHAVIOR

18a. Do you subscribe to or frequently buy ...

	(Q.18A) Yes	No	(Q.18B-Thoroughness) Not at all				Very	N/S
a) Motorland	1	2	1	2	3	4	5	6
b) National Geographic	1	2	1	2	3	4	5	6
c) Time Magazine	1	2	1	2	3	4	5	6
d) Reader's Digest	1	2	1	2	3	4	5	6
e) Sunset Magazine	1	2	1	2	3	4	5	6
f) The California Magazine	1	2	1	2	3	4	5	6
g) People Magazine	1	2	1	2	3	4	5	6
h) Backpacker	1	2	1	2	3	4	5	6
i) Outside	1	2	1	2	3	4	5	6
j) Leisure World	1	2	1	2	3	4	5	6
k) Westways	1	2	1	2	3	4	5	6
l) Pacific Northwest	1	2	1	2	3	4	5	6
m) Modern Maturity	1	2	1	2	3	4	5	6
n) Travel and Leisure	1	2	1	2	3	4	5	6
o) Endless Vacation	1	2	1	2	3	4	5	6
p) American West	1	2	1	2	3	4	5	6
q) San Francisco Focus	1	2	1	2	3	4	5	6
r) Los Angeles Magazine	1	2	1	2	3	4	5	6
s) San Diego Magazine	1	2	1	2	3	4	5	6

18b. On a scale of one to five where one represents "not at all thoroughly" and five represents "very thoroughly", in general, how thoroughly do you read ... (INSERT PUBLICATIONS WITH "YES" RESPONSE IN Q.18A)?

18c. What newspapers do you subscribe to or read frequently? (CIRCLE ALL MENTIONS) (FREQUENTLY MEANS 3 OR MORE TIMES A WEEK)

None 01
L.A. Times 02
Los Angeles Herald-Examiner 03
Los Angeles News 04

Oakland Tribune 05
San Diego Union 06
San Francisco Examiner 07
San Francisco Chronicle 08

Sacramento Bee 09
San Jose Mercury News 10
Wall Street Journal 11
Other 12
Not stated 13

CRITERION

19. Thinking now for a moment about your television viewing habits. How many days a week are you likely to watch television between

									N/S
7 a.m. and 9 a.m.	0	1	2	3	4	5	6	7	8
9 a.m. and Noon	0	1	2	3	4	5	6	7	8
Noon and 1 p.m.	0	1	2	3	4	5	6	7	8
1 p.m. and 5 p.m.	0	1	2	3	4	5	6	7	8
5 p.m. and 7 p.m.	0	1	2	3	4	5	6	7	8
7 p.m. and 10 p.m.	0	1	2	3	4	5	6	7	8
10 p.m. and Midnight ...	0	1	2	3	4	5	6	7	8

20. How many days a week do you watch .....?

									N/S
a) News	0	1	2	3	4	5	6	7	8
b) Situation comedies ..	0	1	2	3	4	5	6	7	8
c) Documentaries	0	1	2	3	4	5	6	7	8
d) Action/crime shows ..	0	1	2	3	4	5	6	7	8
e) Network movies	0	1	2	3	4	5	6	7	8
f) Sports	0	1	2	3	4	5	6	7	8
g) One hour dramas	0	1	2	3	4	5	6	7	8
h) Evening soaps	0	1	2	3	4	5	6	7	8
i) Daytime soaps	0	1	2	3	4	5	6	7	8
j) Game shows	0	1	2	3	4	5	6	7	8
k) Nature shows	0	1	2	3	4	5	6	7	8
l) Specials	0	1	2	3	4	5	6	7	8

SECTION V - ALBERTA VACATION

21. Have you heard of _____ as a place for a vacation trip? (READ LIST)

	Yes	No	D/K
Alberta	1	2	3
Calgary	1	2	3
Edmonton	1	2	3
Banff	1	2	3
Lake Louise	1	2	3
Jasper	1	2	3
Canadian Rockies	1	2	3
None of the above	1 - SKIP TO Q.24A		

CRITERION

22. You mentioned you've heard of Alberta or some places in Alberta as a place to visit for a vacation trip. Where is Alberta located?

(DO NOT READ LIST. DO NOT PROBE - CIRCLE ALL THAT APPLY)

North of Montana	01
East of British Columbia	02
West of Saskatchewan	03
Between B.C. and Saskatchewan	04
In the prairies	05
In the Canadian Rockies	06
North	07
Western Canada	08
In the west	09
It's in Canada	10
Other (Specify) _____	
Don't know	99

23a. Have you ever visited .... (READ LIST) on a vacation trip? (RECORD BELOW UNDER Q.23A.)

23b. FOR EACH "YES" IN Q.23A, ASK: In the past 12 months have you visited .... (READ LIST) on last vacation trip? (RECORD BELOW UNDER Q.23B)

	(Q.23A) Ever visited			(Q.23B) In the past 12 months		
	Yes	No	DK	Yes	No	DK
* Alberta	1	2	3	1	2	3
* Calgary	1	2	3	1	2	3
* Edmonton	1	2	3	1	2	3
* Banff	1	2	3	1	2	3
* Lake Louise	1	2	3	1	2	3
* Jasper	1	2	3	1	2	3
* The Canadian Rockies	1	2	3	1	2	3
British Columbia	1	2	3	1	2	3
Vale or Aspen, Colorado	1	2	3	1	2	3
Whistler, British Columbia	1	2	3	1	2	3
Whitefish or Big Sky, Montana	1	2	3	1	2	3
None of the above	1 - SKIP TO Q.24A			1 - ASK Q.24A		

24a. Have you ever heard of the Calgary Stampede?

Yes	1	- CONTINUE
No	2	] SKIP TO Q.25
Not stated	3	

CRITERION

24b. How did you hear of the Calgary Stampede?

Friend/relative	1
Travel	2
Advertising	3
Other	4
Never heard of it	5
Not stated	6

24c. Have you ever considered visiting the Calgary Stampede?

Yes	1	] CONTINUE
Have already attended	3	
No	2	] SKIP TO Q.25
Not stated	4	

24d. If you were to visit the Calgary Stampede, on a scale of 1 to 5 where 1 is very unimportant and 5 is very important, how important would the (INSERT CATEGORY) be in your decision to attend?

	Very Unimportant				Very Important	N/S
Rodeo or cowboys	1	2	3	4	5	6
Music or entertainment	1	2	3	4	5	6
Indians	1	2	3	4	5	6
Agriculture showcase	1	2	3	4	5	6
Chuckwagon races	1	2	3	4	5	6
Rocky Mountain scenery	1	2	3	4	5	6
Fair or midway	1	2	3	4	5	6
City wide celebration	1	2	3	4	5	6
Hospitality or western experience	1	2	3	4	5	6

25. (IF SOME ASTERISKED LOCATION HAS BEEN VISITED IN Q.23A BUT NOT VISITED IN PAST 12 MONTHS IN Q.23B, ASK) In what year did you last visit Alberta?

_ _ _ _

(IF NO ASTERISKED LOCATION VISITED IN Q. 23A OR Q. 23B, SKIP TO Q. 27A)

CRITERION

26. Thinking of your last Alberta trip, which <u>one</u> trip type defined below best describes the kind of trip you took? (READ UNDERLINED LIST - CIRCLE ONE ANSWER ONLY) Was it .....

a. <u>An outdoor vacation.</u> A vacation in a natural area where you may engage in activities such as camping, fishing, hiking or rafting. 01

b. <u>A resort vacation.</u> A trip to a resort area where a wide variety of seasonal activities, such as swimming, skiing, golfing, tennis and so on, are available close by or on the premises. 02

c. <u>A touring vacation.</u> A vacation by car or bus or train through areas of scenic beauty, cultural or general interest. 03

d. <u>A town or city trip.</u> A trip to a town or city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city. 04

e. <u>A visit to friends or relatives.</u> A trip whose primary purpose is to visit and spend time with friends or relatives. 05

f. <u>A business or convention trip.</u> For instance, attending a meeting, seminar, conference, or convention. 06

g. <u>A combined business and pleasure trip.</u> A trip that combines business and pleasure. 07

h. <u>A golfing holiday.</u> 08

27. Which of the following statements best describes your likelihood of travelling to Alberta in the next 12 months? (READ LIST)

I've already completed planning for a trip	1	] CONTINUE
I'm definitely planning on it	2	
I'm considering it	3	] SKIP TO Q.34
I'm not presently, but would consider it	4	
I wouldn't consider it	5	] SKIP TO Q.36
Don't know	6	
Not sure	99	

CRITERION

28. What is the main purpose of this trip you are planning to Alberta? Would it be ..... (READ UNDERLINED LIST)

a. <u>An outdoor vacation.</u> A vacation in a natural area where you may engage in activities such as camping, fishing, hiking or rafting. 01

b. <u>A resort vacation.</u> A trip to a resort area where a wide variety of seasonal activities, such as swimming, skiing, golfing, tennis and so on, are available close by or on the premises. 02

c. <u>A touring vacation.</u> A vacation by car or bus or train through areas of scenic beauty, cultural or general interest. 03

d. <u>A town or city trip.</u> A trip to a town or city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city. 04

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f. <u>A business or convention trip.</u> For instance, attending a meeting, seminar, conference, or convention. 06

g. <u>A combined business and pleasure trip.</u> A trip that combines business and pleasure. 07

h. <u>A golfing holiday.</u> 08

29a. How many days will the complete trip take?

_ _

29b. How many days do you think you will spend in Alberta?

_ _

29c. How many days will you spend in the Rocky Mountains?

_ _

30. How many members of your household, including yourself, will be included on this trip?

_ _

CRITERION

31. What method of transportation best describes what you are planning to use for this vacation?

My own car	1
My own camper/recreation vehicle	2
Airplane	3
Airplane/rental vehicle	4
Other	5
Not stated	6

32. What type of accommodations will you mainly use while you are in Alberta? (CIRCLE ONE RESPONSE ONLY)

Hotel	1	- CONTINUE
Camping/camper/	2	SKIP TO Q.33
R.V./recreational vehicle	3	
Friends/relatives	4	
Motel	5	
Other/lodge	6	
Not stated	7	

33. Would you categorize your hotel accommodations as luxury or 4-Star or as budget?

Luxury/4-Star	1
Budget	2
Not stated	3

34. Will your Alberta vacation likely occur in ...

	Spring	1
	Summer	2
	Fall	3
or	Winter	4
	Don't know	5

35. If you were planning a trip to Alberta, Canada, how would you collect the information you needed?

	1st Mention	2nd Mention
Go to an automobile club	01	01
Go to a travel club	02	02
Talk to a travel agent	03	03
Call a 1-800 number	04	04
Mail in card from a magazine	05	05
Mail in coupons from a magazine	06	06
Write a letter	07	07
Circle a number on a reader's card from a magazine	08	08
Talk to friends or family	09	09
Contact Travel Alberta/Alberta Tourism	10	10
Go to the library	11	11
OTHER (PLEASE SPECIFY) _____		
Don't know	99	99

CRITERION

36. If vacationing in the Canadian Rockies, would you or someone in your household consider golfing at various resorts as part of your trip?

Yes 1
No 2
Not stated 3

37. Would you or someone in your household consider a golf tour vacation at various resorts in the Canadian Rockies?

Yes 1
No 2
Not stated 3

SECTION VI - ALBERTA ADVERTISING AND SLOGANS

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38. In the past 12 months have you seen or heard any advertising for Alberta?

Yes ..... 1 - CONTINUE
No ..... 2] SKIP TO Q.40
Not stated ... 3]

39. Where did you see or hear this advertising? PROBE: Anywhere else? (DO NOT READ LIST. CIRCLE ALL MENTIONS.)

Magazines 1
Television 2
Radio 3
Newspaper 4
Billboards 5
Posters 6
Other 7
Don't know 8

40. Have you heard the following theme slogans or phrases before? (ROTATE LIST)

	Yes	No	Not sure
Alberta In All Her Majesty	1	2	3
Alberta, Land of Legends	1	2	3
Ski Alberta	1	2	3
Take An Alberta Break	1	2	3
Supernatural British Columbia	1	2	3
Yukon ... The Magic and the Mystery	1	2	3

CRITERION

SECTION VII - BACKGROUND INFORMATION

ASK EVERYONE:

The last few questions are being asked so we may classify the information from this study. All your answers will be kept strictly confidential.

41. Including yourself, how many people are there in your household?

One	1
Two	2
Three	3
Four	4
Five or more	5
Don't know	6

IF MORE THAN ONE IN HOUSEHOLD ASK:

42. How many are ...? (READ LIST)

Children under 6 years	_ _
Children 6-12 years	_ _
Teenagers 13-17 years	_ _
18 years and over, including yourself	_ _
Not stated	99

ASK EVERYONE:

43. What is the highest level of education you have completed?

Less than high school	1
Completed high school	2
Junior/community college/technical/ vocational school	3
Some university/college	4
Completed university/college	5
Postgraduate	6
Refused	7

IF MORE THAN ONE ADULT IN HOUSEHOLD IN Q.42, ASK:

44. How many wage earners are there in your household?

One	1	ASK Q.45
Two	2	
Three or more	3	
None	4	SKIP TO Q.46
Refused	5	

CRITERION

45. Are you the chief wage earner? The chief wage earner is that person in your household with the highest income.

Yes, respondent is	1	- SKIP TO Q.48
No, someone else is	2	] ASK Q.46
Refused	3	

46. What is the age of the chief wage earner? (READ LIST)

Under 45 years	1
45 years or over	2
Don't know	3

47. What is the highest level of education the chief wage earner has completed?

Less than high school	1
Completed high school	2
Junior/community college/technical/ vocational school	3
Some university/college	4
Completed university/college	5
Postgraduate	6
Refused	7

ASK EVERYONE:

48. In at least two words, please describe the occupation of the chief wage earner? (IF RESPONDENT SAY THERE IS NO CHIEF WAGE EARNER, ASK FOR RESPONDENT'S OCCUPATION.)

_____ - -

_____ - -

49. Which of following categories best describes your race or ethnic background?

Black or African American	01
Asian or Pacific Islander	02
Caucasian or white	03
Hispanic or Central American	04
Native American	05
Other _____	_ _
Not stated	99

CRITERION

50. I also have some income categories. Please stop me at the appropriate place. Was your total annual household income before taxes in 1989 .... ? (READ LIST)

Under $10,000	01
$10,000 - $20,000	02
$20,000 - $25,000	03
$25,000 - $30,000	04
$30,000 - $40,000	05
$40,000 - $50,000	06
$50,000 - $60,000	07
$60,000 - $70,000	08
$70,000 - $80,000	09
$80,000 - $90,000	10
$90,000 or more	11
Don't know/refused	12

51. DO NOT READ: RECORD SEX OF RESPONDENT

MALE	1
FEMALE	2

52. (ASK FOR THOSE WHO GAVE A RESPONSE OF 1,2, OR 3 IN Q.27) If you give us your name and address, a package of information will be sent to you by Alberta Tourism.

_____

_____

_____

_____

53. For my supervisor I need to verify your telephone number. Is it

Telephone No. (_ _ _) _ _ _ - _ _ _ _

54. What county do you live in?

_____ _ _

55. (ASK IF Q.37 IS NOT FILLED IN) And my last question, what is your zip code?

_ _ _ _ _

THANK YOU VERY MUCH FOR YOUR HELP AND INFORMATION!

CRITERION